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Major Appliances
and
Electrical Housewares

Including a New Consumer
Buying Intention Survey

FAIRCHILD FACT FILE

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TABLE OF CONTENTS

MAJOR APPLIANCES & ELECTRIC APPLIANCES

Page

MARKET TRENDS.................... 1
GENERAL INDUSTRY STATISTICS.................... 2
  EMPLOYMENT & EARNINGS.................... 7
  CONCENTRATION IN THE INDUSTRY.................... 8
  LOCATION OF THE INDUSTRY.................... 9

MAJOR APPLIANCES

PRODUCT

SHIPMENTS.................... 9
FOREIGN TRADE....................18
PRODUCER PRICES....................20
CONTRACT MARKET....................21
OWNERSHIP....................23

ELECTRIC HOUSEWARES

GENERAL INDUSTRY STATISTICS....................24
  EMPLOYMENT & EARNINGS....................25
  CONCENTRATION IN THE INDUSTRY....................25
  LOCATION OF THE INDUSTRY....................25
PRODUCT SHIPMENTS....................26
FOREIGN TRADE....................30
TOP HOUSEWARES SUPPLIERS....................32

MAJOR APPLIANCES & ELECTRIC HOUSEWARES AT THE RETAIL LEVEL

THE POTENTIAL MARKET....................33
CONSUMER MARKET....................35
RETAIL SALES....................38
  BY OUTLET TYPE....................38
  BY AREA....................43
  MICROWAVE OVEN SALES....................44
CONSUMER PRICES....................45
RETAIL ADVERTISING....................45
CONSUMER BUYING HABITS....................46

SCHEDULE OF ADDITIONAL FACT FILES....................51

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MAJOR APPLIANCES AND ELECTRIC HOUSEWARES

Market Trends

Consumers spent $24.3 billion on kitchen and other household appliances in 1984, an 11.2% increase for the year. These expenditures, as reported by the Bureau of Economic Analysis (U.S. Department of Commerce), encompass purchases of refrigerators and freezers, cooking ranges, dishwashers, laundry equipment, stoves, air conditioners, sewing machines, vacuum cleaners, and other appliances. Also included is the retail value of these products furnished in new privately-owned housing units acquired by consumers during the year.

The major appliance industry set an all-time record for unit sales to dealers in 1984, a feat that is proving difficult to top in 1985. Analysts anticipate a relatively modest gain for the year, with most analysts predicting growth of about 5%. Contributing to what may essentially be a "flat year" is a downturn in the contract market for major appliances, as housing starts fall. On the other hand, a generally favorable U.S. economy has provided consumers with more discretionary income.

Microwave ovens continue to be the biggest seller among appliances, but the explosive demand for them in 1984 seems to have tapered off in 1985. Sales this year are forecast to rise at a respectable level (Merchandising magazine forecasts a 19% gain), but their performance has to be a letdown, after the 54% gain in 1984, to 9.1 million units. Much of the category's growth has come from the under one-cubic-foot size, with strong sales appeal in the mass market.

More traditional major appliances such as refrigerators and freezers, washers and dryers, and air conditioners also attained high sales levels in 1984, but again, 1985 is a new challenge. A weakening of the housing market in mid-1985, the duration of which is not yet known, has lowered expectations for sales of these products this year, reflecting the importance of the contract market for major appliance manufacturers. The industry is pinning its hopes on the huge potential of the replacement market, as consumers purchase new models to replace the units they bought in the early 1970's.

These new models contain technological advances which should inspire consumers to replace outmoded appliances. Refrigerators, for example, now have the capacity to make ice cream. Manufacturers are anticipating a favorable reaction to the new electronic controls that they are putting on their products which, among other things, alert users when--and how--their appliances are malfunctioning. The trend toward higher efficiency air conditioning units will continue in 1985.

The electric housewares market has also been galvanized by the introduction of new technologies that have stimulated replacement sales. The National Housewares Manufacturers Association reports that much of 1984's growth was generated by increased unit movement; two-thirds of all manufacturers did not raise their prices during the year.

The success of "smart" irons--those capable of turning themselves off--helped that product category to a 20% sales gain in 1984. Sales of new rechargeable kitchen tools, including cordless can openers, irons, blenders and electric knives, are being closely watched by the industry to determine whether they represent a new phase in appliances. Another notable performer in 1984 were sales of under-the-cabinet appliances, particularly coffee makers. Sources believe that these space-saving products will attain a total share of about 10%.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

The U.S. Bureau of the Census has recently issued the final 1982 census of manufactures report in the Industry Series. Conduced every five years, census findings detail manufacturing activity in the major appliances and electric housewares industry. All dollar figures included in this report are at current prices for the year specified and, therefore, are unadjusted for changes in price levels. The inflation that has occurred over the 1977-1982 period should be taken into consideration when making comparisons.

Industry shipments of household appliances rose 18.0% over the five year period, despite a 5.9% drop in the number of production companies. New capital expenditures have soared, a trend that has continued into the mid-1980's as the industry has embarked on its biggest spending binge in years. In 1984, the six largest producers spent a total of $323 million for new plant and equipment, up 60% for the year.

	1982	1977	% Change 1982/1977
Household Appliances (SIC 363*) (includes electric housewares)			
Number of companies	528	561	- 5.9%
Number of establishments, total**	631	667	- 5.4
Number with 20 or more employees	335	343	- 2.3
Employees, total (thous.)	129.4	162.2	-20.2
Production workers (thous.)	98.1	128.7	-23.8
Payroll (mil. $)	$2,223.2	$1,898.5	+17.1
Value added by manufacture# (mil. $)	5,802.5	5,277.8	+ 9.9
Value of industry shipments## (mil. $)	12,670.9	10,741.0	+18.0
Capital expenditures, new (mil. $)	305.0	207.2	+47.2
Household Cooking Equipment (SIC 3631*)			
Number of companies	71	84	-15.5%
Number of establishments, total**	88	96	- 8.3
Number with 20 or more employees	59	58	+ 1.7
Employees, total (thous.)	23.7	25.4	- 6.7
Production workers (thous.)	17.0	19.1	-11.0
Payroll (mil. $)	$ 402.1	$ 289.1	+39.1
Value added by manufacture# (mil. $)	941.4	784.1	+20.1
Value of industry shipments## (mil. $)	2,414.9	1,707.2	+41.5
Capital expenditures, new (mil. $)	51.5	36.1	+42.7
Household Refrigerators, Freezers (3632*)			
Number of companies	39	33	+18.2%
Number of establishments, total**	50	42	+19.0
Number with 20 or more employees	30	25	+20.0
Employees, total (thous.)	22.4	35.8	-37.4
Production workers (thous.)	18.4	29.8	-38.3
Payroll (mil. $)	$ 441.2	$ 468.6	- 5.8
Value added by manufacture# (mil. $)	1,032.2	1,166.1	-11.5
Value of industry shipments## (mil. $)	2,470.7	2,576.6	- 4.1
Capital expenditures, new (mil. $)	79.1	46.9	+68.7

(continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

	1982	1977	% Change 1982/1977
Household Laundry Equipment (SIC 3633*)			
Number of companies	15	21	-28.6%
Number of establishments, total**	25	31	-19.4
Number with 20 or more employees	20	24	-16.7
Employees, total (thous.)	16.5	19.4	-14.9
Production workers (thous.)	13.4	15.9	-15.7
Payroll (mil. $)	$ 335.4	$ 262.4	+27.8
Value added by manufacture# (mil. $)	984.1	844.7	+16.5
Value of industry shipments## (mil. $)	2,122.2	1,792.8	+18.4
Capital expenditures, new (mil. $)	35.1	27.3	+28.6
Household Vacuum Cleaners (SIC 3635*)			
Number of companies	29	33	-12.1%
Number of establishments, total**	31	36	-13.9
Number with 20 or more employees	18	23	-21.7
Employees, total (thous.)	8.4	10.4	-19.2
Production workers (thous.)	5.2	7.4	-29.7
Payroll (mil. $)	$ 151.1	$ 117.1	+29.0
Value added by manufacture# (mil. $)	463.6	380.4	+21.9
Value of industry shipments## (mil. $)	775.7	644.3	+20.4
Capital expenditures, new (mil. $)	17.1	16.4	+ 4.3
Sewing Machines (SIC 3636*)			
Number of companies	86	86	--
Number of establishments, total**	91	91	--
Number with 20 or more employees	25	25	--
Employees, total (thous.)	5.5	8.2	-32.9%
Production workers (thous.)	3.4	6.1	-44.3
Payroll (mil. $)	$ 101.9	$ 107.0	- 4.8
Value added by manufacture# (mil. $)	168.8	208.9	-19.2
Value of industry shipments## (mil. $)	299.7	304.9	- 1.7
Capital expenditures, new (mil. $)	8.6	8.1	+ 6.2
Household Appliances, n.e.c. (SIC 3639*)			
Number of companies	70	65	+ 7.7%
Number of establishments, total**	83	80	+ 3.8
Number with 20 or more employees	49	40	+22.5
Employees, total (thous.)	14.2	15.7	- 9.6
Production workers (thous.)	11.4	12.8	-10.9
Payroll (mil. $)	$ 252.4	$ 195.6	+29.0
Value added by manufacture# (mil. $)	673.8	527.9	+27.6
Value of industry shipments## (mil. $)	1,432.0	1,184.0	+20.9
Capital expenditures, new (mil. $)	40.6	24.6	+65.0

(footnotes continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

(footnotes continued)

n.e.c. not elsewhere classified.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 363 is the composite identifier for the appliance/electric housewares industry. Included in this category is the electric housewares industry (SIC 3634) which is separately covered in this Fact File in the section on electric housewares and personal care appliances.

SIC 3631 comprises equipment primarily engaged in manufacturing household cooking equipment, such as stoves, ranges and ovens, including both electric and non-electric types. Also included in this category are barbeque grills and microwave ovens.

SIC 3632 includes establishments primarily engaged in producing household refrigerators and home and farm freezers.

SIC 3633 includes establishments primarily engaged in manufacturing laundry equipment such as washing machines, wringers, dryers, and irons for household use. This industry also includes producers of coin-operated washers and driers.

SIC 3635 includes establishments primarily engaged in producing vacuum cleaners for household use.

SIC 3636 includes establishments primarily engaged in manufacturing sewing machines for domestic and industrial use.

SIC 3639 includes establishments primarily engaged in manufacturing household appliances, not elsewhere classified, such as water heaters, dishwashers and food waste disposal units. This industry also includes producers of dishwashing machines, floor waxes and polishers.

** Each business location is counted as a separate establishment.

‡ Value added by manufacture is derived by subtracting the total cost of materials (including supplies, fuel, electric energy, cost of resales and miscellaneous receipts) from the value of shipments (including resales) and other receipts, and adjusting the resulting amount by the net change in finished products and work-in-process inventories between the beginning and the end of the year.

‡‡ Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. It includes receipts for contract work, all items made by, or for, each establishment from materials owned by it, and also miscellaneous receipts. It also includes both primary and secondary products made in these industries. The value of shipments of appliances, only, by all producers, including manufacturers making them as secondary products, (described as PRODUCT SHIPMENTS as opposed to INDUSTRY SHIPMENTS) is covered on pages 9-17.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series, MC82-I-36B.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Industry Trends 1977-1984

The International Trade Administration (U.S. Department of Commerce) measures industry trends in both current and constant dollars. A constant dollar basis removes the effects of inflation and shows that, in terms of industry shipments, the household appliance industry had difficulties during the 1981-82 recession. Estimates of growth in 1983 and 1984 reflect the improved state of the U.S. economy as well as the continual capital spending by the industry, even during the recession.

Household Appliances Industry--Value of Industry Shipments, 1977-1984

(All values in millions of dollars)

	Historical Trends						Estimates		Compound Annual Growth Rate	% Change
	1977	1978	1979	1980	1981	1982	1983	1984	1977-1982	1984/1983
Household Appliances (SIC 363)										
Current dollar value	$10,737	11,488	12,741	12,936	13,108	12,662	14,780	16,648	+ 3.4%	+12.6%
Constant (1972 $) value	8,014	8,129	8,556	8,003	7,569	6,922	7,737	8,530	- 2.9	+10.2
Household Cooking Equipment (SIC 3631)										
Current dollar value	$ 1,707	1,912	2,353	2,466	2,526	2,418	3,061	3,536	+ 7.2	+15.5
Constant (1972 $) value	$ 1,209	1,298	1,519	1,461	1,421	1,295	1,532	1,730	+ 1.4	+12.9
Household Refrigerators, Freezers (SIC 3632)										
Current dollar value	$ 2,577	2,773	2,684	2,460	2,703	2,456	3,026	3,059	- 1.0	+16.0
Constant (1972 $) value	$ 1,848	1,897	1,775	1,527	1,526	1,276	1,512	1,700	- 7.1	+12.4
Household Laundry Equipment (SIC 3633)										
Current dollar value	$1,793	1,946	2,215	2,142	2,259	2,105	2,581	2,891	+ 3.3	+12.0
Constant (1972 $) value)	$1,280	1,332	1,434	1,277	1,256	1,093	1,315	1,450	- 3.1	+10.3
Household Vacuum Cleaners (SIC 3635)										
Current dollar value	$ 640	683	796	754	770	782	848	937	+ 4.1	+10.4
Constant (1972 $) value	$ 516	523	586	507	500	487	513	555	- 1.2	+ 8.2
Sewing Machines (SIC 3636)										
Current dollar value	$ 305	324	399	403	310	293	318	350	- 0.8	+10.1
Constant (1972 $) value	$ 201	198	223	211	143	129	138	150	- 8.6	+ 8.7
Household Appliances, n.e.c. (SIC 3639)										
Current dollar value	$1,184	1,268	1,425	1,411	1,462	1,449	1,781	2,073	+ 4.1	+16.4
Constant (1972 $) value	$ 871	897	951	858	837	775	915	1,035	- 2.3	+13.1

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Employment & Earnings

Current information on employment and earnings in the major appliance and electric housewares industry is supplied by the U.S. Bureau of Labor Statistics. Their figures show the extent of the industry's recovery from the 1981-82 recession. Total employment in 1984 rose 7.5% for the year, led by the 15.2% annual gain in the refrigerator and freezer segment.

Employment & Earnings in the Major Appliance & Electric Housewares Industry

	August Monthly Averages			Annual Averages		
	1985(p)	1984	% Change 1985/84	1984	1983	% Change 1984/1983
Household Appliances (SIC 363) (includes Electric Housewares)						
All employees (thous.)	143.8	146.2	- 1.6%	149.8	139.4	+ 7.5%
Production workers (thous.)	112.5	115.3	- 2.4	118.5	108.5	+ 9.2
Avg. weekly earnings	$375.60	$357.90	+ 4.9	$360.10	$343.60	+ 4.8
Avg. hourly earnings	$ 9.32	$ 8.97	+ 3.9	$ 8.98	$ 8.59	+ 4.5
Avg. weekly hours	40.3	39.9	- 1.0	40.1	40.0	+ 0.3
Household refrigerators & freezers (SIC 3632)						
All employees (thous.)	29.0	26.3	- 10.3%	31.0	26.9	+ 15.2%
Production workers (thous.)	22.5	20.2	+ 11.4	24.9	21.4	+ 16.4
Avg. weekly earnings	$425.58	$434.08	- 2.0	$416.56	$401.96	+ 3.6
Avg. hourly earnings	$ 10.38	$ 10.36	+ 0.2	$ 10.26	$ 9.78	+ 4.9
Avg. weekly hours	41.0	41.9	- 2.1	40.6	41.1	- 1.2
Household laundry equipment (SIC 3633)						
All employees (thous.)	22.2	22.0	+ 0.9%	21.0	19.4	+ 8.2%
Production workers (thous.)	17.3	17.1	+ 1.2	16.4	15.0	+ 9.3
Avg. weekly earnings	$433.88	$416.97	+ 4.1	$426.12	$403.20	+ 5.7
Avg. hourly earnings	$ 10.82	$ 10.61	+ 2.0	$ 10.60	$ 10.08	+ 5.2
Avg. weekly hours	40.1	39.3	+ 2.0	40.2	40.0	+ 0.5

(p) preliminary

NOTE: BLS data on employment totals differs from Census Bureau data due to a difference in methodology in computing the figures. Separate employment and earnings statistics for the electric housewares industry only is covered in the Electric Housewares section of this Fact File.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Concentration in the Industry

The Household Appliance Industry (SIC 363)
By Employment Size, 1982
(Includes only establishments with payrolls)

	Household Appliances (SIC 363)		Household Cooking Equipment (SIC 3631)		Household Refrigerators & Freezers (SIC 3632)		Household Laundry Equipment (SIC 3633)	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
Total plants	589	100.0%	72	100.0%	48	100.0%	27	100.0%
Number by employment size:								
Under 20 employees	253	42.9	21	29.2	18	37.5	5	18.5
20-99 employees	138	23.4	12	16.7	12	25.0	6	22.2
100-499 employees	117	19.9	21	29.2	8	16.7	6	22.2
500 or more employees	81	13.8	18	25.0	10	20.8	10	37.0

	Household Vacuum Cleaners (SIC 3635)		Sewing Machines (SIC 3636)		Household Appliances n.e.c. (SIC 3639)	
	Number	% of Total	Number	% of Total	Number	% of Total
Total plants	33	100.0%	83	100.0%	83	100.0%
number by employment size:						
Under 20 employees	11	33.3	59	71.1	28	33.7
20-99 employees	11	33.3	14	16.9	30	36.1
100-499 employees	7	21.2	7	8.4	14	16.9
500 or more employees	4	12.1	3	3.6	11	13.3

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census, *County Business Patterns 1982.*

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in Specified Major Appliance Industries, 1982

	Establishments		Value of Industry Shipments (Mil. $)
	Total	No. With 20+ Employees	
Household cooking equipment (SIC 3631*), total	88	59	$2,414.9
Leading states:			
Tennessee	17	14	na
Illinois	11	10	260.9
Sewing machines (SIC 3636*) total	91	25	299.7
Leading states:			
New York	38	9	29.8
Connecticut	4	2	8.9
Household appliances, n.e.c. (SIC 3639*), total	83	49	1,432.0
Leading states:			
California	16	7	126.3
Ohio	6	4	54.1

* For a definition of these SIC codes, see page 4.
na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
Industry Series, MC82-I-36B.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Statistics provided by the Association of Home Appliance Manufacturers and the Association of Gas Appliance Manufacturers indicate that unit shipments of major home appliances rose 6.4% during the first seven months of 1985 against the comparable 1984 level. The bulk of this increase is due to the proliferation of microwave oven/range shipments, which soared 32% during the period to more than 6 million units. In fact, if microwave shipments were excluded from the total, then the rate of increase during the January-July 1985 period would be only 0.3% higher than last year.

Unit Shipments of Major Home Appliances,
January-July 1984, 1985
(Thousands of units)

	January-July		% Change
	1985	1984	1985/84
Total shipments*	25,091.1	23,572.9	+ 6.4%
Room air conditioners	2,762.2	2,815.4	- 1.9
Dehumidifiers	547.3	528.6	+ 3.5

(continued)

Unit Shipments of Major Home Appliances, January-July 1984, 1985

(Thousands of units)
(continued)

	January-July		% Change
	1985	1984	1985/84
Dishwashers	2,028.5	2,017.9	+ 0.5%
Built-in	1,887.3	1,882.6	+ 0.2
Portable	141.2	135.3	+ 4.4
Disposers	2,385.4	2,347.3	+ 1.6
Compactors	99.6	102.1	- 2.4
Refrigerators	3,593.1	3,669.5	- 2.1
Freezers	755.5	804.8	- 6.1
Upright	362.3	383.4	- 5.5
Chest	393.2	421.4	- 6.7
Electric ranges	1,758.9	1,789.9	- 1.7
Free standing	1,432.7	1,441.9	- 0.6
Built-in	326.2	348.1	- 6.3
Gas ranges	974.7	962.9	+ 1.2
Free standing	852.3	--	--
Built-in	56.8	61.0	- 6.9
Microwave ovens/ranges**	6,041.1	4,577.0	+ 32.0
Clothes washers, automatic	3,055.4	2,971.1	+ 2.8
Clothes dryers	2,182.2	2,079.9	+ 4.9
Electric	1,725.1	1,660.4	+ 3.9
Gas	457.1	419.4	+ 9.0
Water heaters	4,042.3	4,203.1	- 3.8
Electric	1,991.8	2,093.8	- 4.9
Gas	2,050.5	2,109.3	- 2.8

* Individual categories will not add to the total because of overlapping product categories.

** Includes imported microwave ovens and combination microwave ovens/ranges.

Source: Association of Home Appliance Manufacturers and the Association of Gas Appliance Manufacturers (August 1985).

The International Trade Administration has estimated the value of household appliance shipments at $15.6 billion for 1984, a 12.7% current dollar increase over 1983. Measured in constant dollars, (eliminating the effects of inflation), shipments are forecast to rise 3.8% during 1985. These figures are product shipments as opposed to industry, and, therefore, cover the value of specified products by all producers, regardless of whether the producer is primarily classified as a household appliance manufacturer.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Estimated Value of Household Appliances Shipped by All U.S. Producers, In Current Dollars, 1983, 1984 & Constant Dollar 1985 Projections
(Value in millions of dollars)

	Current $		Constant (1972) $	
Products	1984(e)	1983(e)	% Change in Shipment Value 1985/1984	Compound Annual Growth Rate 1972-1982
Household appliances, total*	$15,571	$13,812	+ 3.8%	- 0.2%
Household cooking equipment	3,434	2,972	+ 6.0	+ 2.0
Household refrigerators, freezers	3,090	2,666	+ 3.5	- 2.3
Household laundry equipment	2,439	2,176	+ 3.0	- 3.3
Vacuum cleaners	1,071	969	+ 4.1	+ 2.4
Sewing machines	266	242	+ 4.4	- 4.3
Household appliances, n.e.c.	2,263	1,947	+ 3.1	+ 0.4

n.e.c. not elsewhere classified; includes dishwashers, water heaters, trash compactors, etc.

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

Detailed data on shipments of major household appliances is contained in the Current Industrial Reports, compiled by the U.S. Bureau of the Census. Virtually all known manufacturers approximately 113 major appliance companies are surveyed for these annual reports.

The detailed nature of the Current Industrial Reports provides insignts into the specific trends in different product categories. For example, production of larger household refrigerators gained market share in 1984 at the expense of smaller models. One explanation for this is the fact that not as many low-cost housing projects are being undertaken as in the past, limiting the need by builders for 11 and 12 cubic-foot models.

MAJOR APPLICANCE PRODUCT SHIPMENTS

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1983, 1984

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1984	1984	1983	1984	1983	% Change 1984/83
Electric ranges, ovens and surface cooking units, including parts	28	8,959.1	7,212.8	$2,342.7	$2,016.5	+16.2%
Free standing ranges:						
Under 23", including apartment house type	8	121.4	123.6	21.4	21.6	- 0.9
23" to 32":						
Low oven, including slide-ins	11	2,227.4	1,814.5	612.7	486.3	+26.0
High ovens	2	48.7	52.9	26.7	29.3	- 8.9
High-low ovens	7					
33" and over	4	35.2	30.7	13.0	11.6	+12.1
Built-in ovens:						
Single oven	12	264.1	290.9	77.7	88.6	-12.3
Two oven	9	58.2	53.1	35.3	31.9	+10.7
Surface cooking tops	11	342.9	355.4	63.3	61.7	+ 2.6
Drop-in ranges	8	223.2	262.5	70.7	90.6	-22.0
Microwave ranges and ovens, excluding portables	9	161.7	155.4	134.2	128.6	+ 4.4
Microwave ovens, portable	13	5,401.1	4,002.9	1,117.5	915.5	+22.1
Gas household ranges, ovens and surface cooking units, including parts	22	1,892.5	1,697.1	542.1	491.6	+10.3
Standard type, free-standing:						
Over 32" cooking top & oven	7	77.0	82.4	25.6	27.2	- 5.9
Over 24" to 32" cooking top & oven	9	1,120.4	997.8	313.4	273.5	+14.6
Apartment ranges, 24" cooking top and under	7	181.9	173.5	32.6	32.1	+ 1.6
Standard type, for built-in installation	9	120.8	85.9	31.3	28.8	+ 8.7
Surface cooking tops	9	131.5	111.5	25.7	17.8	+44.4
Nonstandard types:						
Wall-hung	3	6.6	4.9	2.0	1.4	+42.9
Slide-in or drop-in	6	194.1	186.2	45.4	41.6	+ 9.1
Hot plates	1	60.2	54.9	38.6	34.9	+10.6
Gas household ranges, ovens and units, n.e.c.	6					

(continued)

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1983, 1984

(continued)

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1984	1984	1983	1984	1983	% Change 1984/83
Other household ranges and cooking equipment (excluding gas and electric) and outdoor parts and accessories	38	10,102.4	9,550.9	$ 465.8	$ 401.9	+15.9%
Barbecuers, grills, etc., for outdoor cooking:						
Permanently installed units	na	181.5	209.1	7.7	9.2	-16.3
Portable units:						
Solid fuel (charcoal,etc.)	16	6,027.8	6,095.4	96.7	89.2	+ 8.4
Gasoline, white gas, kerosene type	4	471.0	454.3	17.9	14.2	+26.1
Other fuel (propane, etc.)	21	3,422.1	2,792.1	307.0	254.3	+20.7
Household refrigerators, including refrigerator-freezer combinations	16	6,316.5	5,702.3	2,573.4	2,249.3	+14.4
Complete units:						
9.4 cubic ft. and under	na	398.7	407.1	72.5	69.8	+ 3.9
9.5 to 12.4 cubic ft.	na	327.2	381.5	92.9	99.2	- 6.4
12.5 to 14.4 cubic ft.	na	998.3	902.9	298.6	269.2	+10.9
14.5 to 17.4 cubic ft.	na	1,732.9	1,674.4	628.4	615.1	+ 2.2
17.5 to 19.4 cubic ft.	na	1,416.2	1,055.3	584.3	441.1	+32.5
19.5 cubic ft. and larger	6	1,409.8	1,248.6	876.0	735.6	+19.1
Range-refrigerator and/or sink combinations	4	33.4	32.5	20.7	19.3	+ 7.3
Food freezers, complete units, household type	10	1,162.0	1,261.8	279.1	305.5	- 8.6
10.4 cubic ft. & under	na	319.5	381.7	58.3	70.7	-17.5
10.5 to 17.4 cubic ft.	na	530.8	537.0	126.8	130.1	- 2.5
17.5 to 21.4 cubic ft.	na	232.0	257.8	69.4	78.1	-11.1
21.5 cubic ft. & larger	na	79.7	85.3	24.6	26.6	- 7.5
Household mechanical washing machines, dryers & washer-dryer combinations	8	8,760.6	8,019.0	2,078.9	1,876.2	+10.8
Washing machines, mechanical, including those with dishwasher attachments:						
Standard size, electrically driven, automatic and semi-automatic, excluding coin-operated	6	5,005.5	4,614.8	1,318.2	1,201.7	+ 9.7
Dryers, mechanical:						
Gas	6	764.9	681.4	171.7	151.5	+13.3
Electric	7	2,882.7	2,619.4	548.4	489.1	+12.1

(continued)

MAJOR APPLICANCE PRODUCT SHIPMENTS

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1983, 1984
(continued)

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1984	1984	1983	1984	1983	% Change 1984/83
Household dishwashing machines, food waste disposers, floor waxing machines and trash compactors	22	na	na	$1,023.7	$ 885.3	+15.6%
Dishwashing machines:						
Portable, including convertible type	6	270.0	354.3	64.7	80.5	-19.6
Built-in type	7	3,159.9	2,785.1	695.2	574.6	+21.0
Floorwaxing, polishing, scrubbing & shampooing machines (for household use only)	4	396.8	332.0	26.5	21.8	+21.6
Food waste disposers	6	3,947.4	3,373.5	172.9	149.0	+16.0
Household trash compactors	6	179.3	158.3	39.8	35.6	+11.8
Water heaters, electric	14	3,829.5	3,373.9	397.8	331.0	+20.2
Storage type:						
44 gallons & under	22	2,272.6	1,988.3	218.7	183.9	+18.9
45 to 54 gallons	9	1,100.3	980.5	119.0	100.4	+18.5
55 gallons and over, and all other types, including circulating and portable storage	na	456.6	405.1	60.2	46.7	+28.9

na not available
nec not elsewhere classified

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Major Household Appliances, MA-36F(84)-1.

In addition to the specific appliances covered in the preceding table, the Census Bureau issues Current Industrial Reports on other types of appliances including air conditioners/dehumidifiers and certain types of heaters, as reported in the following tables.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Air Conditioners/Dehumidifiers

Quantity & Value of Shipments of Room Air Conditioners & Dehumidifiers by All U.S. Producers, 1982, 1983

	Quantity (Thous. Units)		% Change	Value (Mil. $)		% Change
	1983	1982(r)	1983/82	1983	1982(r)	1983/82
Room air conditioners, total	2,501.6	3,322.0	-24.7%	$632.0	$892.3	-29.2%
5,999 Btu/Hr. and under	454.4	635.0	-28.4	77.4	109.3	-29.2
6,000-6,999 Btu/hr.	80.4	115.3	-30.3	18.5	25.5	-27.5
7,000-7,999 Btu/hr.	146.7	241.1	-39.2	34.3	55.4	-38.1
8,000-8,999 Btu/hr.	151.4	136.4	+11.0	39.5	34.3	+15.2
9,000-9,999 Btu/hr.	134.6	173.0	-22.2	38.0	49.2	-22.8
10,000-12,999 Btu/hr.	390.1	501.9	-22.3	115.1	148.4	-22.4
13,000-19,999 Btu/hr.	342.2	775.0	-55.8	125.3	264.8	-52.7
20,000 Btu/hr.	192.0	305.4	-37.1	88.6	134.3	-34.0
Electrically operated dehumidifiers, mechanically refrigerated, self-contained	610.2	438.8	+39.1	95.2	71.1	+33.9

(r) revised

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Air-Conditioning & Refrigeration Equipment
MA-35M(83)-1.

Heating Stoves

Quantity & Value of Shipments of Heating Stoves By All U.S. Producers, 1982, 1983

	Quantity (Thous. Units)		% Change	Value (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Domestic heating stoves, total	1,177.3	1,305.8	- 9.8%	$289.2	$310.5	- 6.9%
Gas	174.5	192.4	- 9.3	28.0	28.9	- 3.1
Wood	737.5	742.9	- 0.7	227.9	246.5	- 7.5
Fireplaces	533.6	509.3	+ 4.8	175.6	191.4	- 8.3
Stoves	203.8	233.5	-12.7	52.3	55.2	- 5.3
Kerosene/Coal	265.3	370.5	-28.4	33.3	35.1	- 5.1
Air space heaters						
Portable room heaters	4,032.8	4,281.0	- 5.8	88.4	96.9	- 8.8
Fan-forced type	2,778.4	3,277.7	-15.2	54.3	68.8	-21.1
Other fan	1,254.4	1,003.3	+25.0	34.1	28.1	+21.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Selected Heating Equipment, MA34N(83)-1.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Floor Care

Data from the 1983 annual survey of manufactures places the value of household vacuum cleaner shipments by all U.S. producers at slightly more than $1 billion. This is an increase of 11.8% in value from the nearly $906 million in shipments reported in the 1982 census of manufactures. Annual surveys are conducted by the U.S. Bureau of the Census in each of the years between censuses to provide a continuous series of basic industry statistics which are the basis for estimates on key measures of manufacturing activity. A survey by Merchandising magazine estimates a 9.2% increase in the unit movement of vacuum cleaners from 1983 to 1984, led by shipments of hand-held lightweight vacuums.

Value of Shipments of Vacuum Cleaners
By All U.S. Producers, 1980-1983
(Millions of dollars)

1983	1982	1981	1980	% Change 1983/1980
$1,013.0	$905.8	$831.0	$817.1	+ 24.0%

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures,
Value of Product Shipments, M83(AS)-2.

Shipments of Floor Care Products, 1983 and 1984

	Quantity (Thous. Units)		% Change
	1984	1983	1984/1983
Vacuum cleaners, total	13,586	12,439	+ 9.2%
Cannister	3,066	2,948	+ 4.0
Upright	4,377	4,229	+ 3.5
Lightweight, total	6,143	5,262	+16.7
Hand-held	5,200	4,250	+22.4
Sticks	943	1,012	- 6.8
Carpet sweepers	1,798	1,712	+ 5.0
Floor polishers	211	210	+ 0.5

Source: Merchandising magazine,
63rd Annual Statistical &
Marketing Reports, 1984.

Value of Shipments of Sewing Machines By All
U.S. Producers, 1980-1983
(Millions of dollars)

1983	1982	1981	1980	% Change 1983/1980
$212.3	$231.0	$241.1	$328.4	- 35.4%

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures,
Value of Product Shipments, M83(AS)-2.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Major Appliances, 1982 & 1983

Electric Clothes Dryers	1983	1982
Whirlpool	47%	45%
General Electric/Hotpoint	17	18
Maytag	15	15
White Consolidated	15	15
All others	6	7

Gas Clothes Dryers	1983	1982
Whirlpool	47%	45%
General Electric/Hotpoint	16	17
White Consolidated	15	15
All others	22	23

Freezers	1983	1982
Whirlpool	34%	33%
White Consolidated	30	29
Admiral	22	24
All others	14	14

Refrigerators	1983	1982
General Electric/Hotpoint	31%	30%
Whirpool	30	29
White Consolidated	23	24
All others	16	17

Clothes Washers	1983	1982
Whirlpool	48%	45%
General Electric/Hotpoint	18	19
Maytag	15	16
White Consolidated	15	15
All others	4	5

Microwave Ovens	1983	1982
General Electric/Hotpoint	16%	15%
Sanyo	13	10
Litton	12	12
Raytheon (Amana, Caloric)	11	13
Sharp	11	12
Tappan	9	9
All others	28	29

Room Air Conditioners	1983	1982
General Electric	24%	22%
White	18	16
Whirlpool (Heil-Quaker)	12	10
Emerson Quiet Kool	7	5
Fedders	7	7
Carrier	6	6
Freidrich	5	6
All others	21	28

Vacuum Cleaners	1983	1982
Hoover	40%	33%
NUE (Eureka)	21	30
Whirlpool (Sears)	16	9
General Signal (Iona, Regina)	10	7
Electrolux	8	13
All others	5	8

Electric Ranges/Ovens	1983	1982
General Electric/Hotpoint	32%	36%
White Consolidated	16	16
Whirlpool	12	10
Roper	10	6
Magic Chef	9	9
Raytheon	8	8
All others	13	15

Gas Ranges/Ovens	1983	1982
Magic Chef	21%	21%
Raytheon	18	19
Tappan	17	19
Roper	14	12
Maytag (Hardwick, Jenn-Air)	10	--
All Others	20	29

Source: Appliance Manufacturer,
8th Annual Appliance Industry, Marketing Guide-1984
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FOREIGN TRADE IN MAJOR APPLIANCES

Imports

Appliance imports were estimated at $2.1 billion in 1984 by the International Trade Administration, up nearly 40% for the year. They accounted for 12.9% of domestic shipments in 1984, as compared with a 10.4% share of the market in 1983. Imports are forecast to reach $2.5 billion in 1985, a 16.3% gain.

A strong U.S. dollar during the mid-1980's has been a key contributor to this surge of appliance imports. Import penetration, however, is not uniform, as some product categories have been virtually untouched by foreign producers. Huge capital expenditure outlays by domestic manufacturers has severely limited the ability of imports to gain ground in the large appliance market. Imports are an important factor only in the sale of microwave ovens, accounting for 38% of unit shipments in 1983. Japan, Singapore and Korea are major suppliers in this area.

Exports

The export value of the following major appliance categories fell 10.0% for the year in 1984. Were it not for the explosive growth of microwave oven exports, the decline in value would have been almost 14%, and exports in units would have been virtually unchanged. The strength of the U.S. dollar overseas and the large international debts accumulated by developing countries have contributed to the stagnation of exports.

Quantity & Value of U.S. Exports of Specified Major Appliances, 1983 & 1984

	Quantity (Thous. Units)		% Change	Value* (Mil. $)		% Change
	1984	1983	1984/83	1984	1983	1984/83
Major appliances, total	2,486.0	2,404.7	+ 3.4%	$381.5	$424.0	-10.0%
Kitchen & related appliances, total	1,792.4	1,643.2	+ 9.1	228.0	238.2	- 4.3
Refrigerators and refrigerator-freezers, household-type, total	147.3	188.6	-21.9	80.8	100.9	-19.9
Under 13.5 cubic feet	35.5	52.1	-31.9	16.8	23.8	-29.4
Over 13.5 cubic feet	111.8	136.5	-18.1	64.0	77.1	-17.0
Freezers, household type	24.1	26.3	- 8.4	10.7	12.8	-16.4
Microwave ovens, household type	156.0	86.9	+79.5	34.8	21.6	+61.1
Household cooking apparatus, exc. portable, of base metal	86.2	121.7	-29.2	14.0	17.5	-20.0
Domestic heating stoves, of base metal	70.2	102.5	-31.5	6.6	9.1	-27.5
Electric cooking stoves and ranges, household type, nspf	46.3	55.6	-16.7	16.2	17.6	- 8.0

(continued)

FOREIGN TRADE

Exports

Quantity & Value of U.S. Exports of Specified Major Appliances, 1983 & 1984
(continued)

	Quantity (Thous. Units)		% Change	Value* (Mil. $)		% Change
	1984	1983	1984/83	1984	1983	1984/83
Nonportable cooking and food warming appliances, nspf	680.6	533.7	+27.5%	$ 27.5	$ 25.6	+ 7.4%
Nonportable electrothermic kitchen and household appliances, nspf	379.5	344.3	+10.2	11.5	9.0	+27.8
Dishwashers, household type	62.1	63.2	- 1.7	15.3	15.4	- 0.6
Food waste disposers, electro-mechanical	140.1	120.4	+ 16.4	10.6	8.7	+21.8
Laundry equipment, total	185.9	190.3	- 2.3	53.2	53.4	- 0.4
Washing machines, excluding commercial and industrial	132.8	142.7	- 6.9	39.1	41.8	- 6.5
Clothes dryers, household types	53.1	47.6	+ 11.6	14.1	11.6	+21.6
Air conditioners, window and wall types, total	126.2	227.2	- 44.5	46.1	81.9	-43.7
Under 10,000 Btu/hr.	31.2	46.8	- 33.3	11.0	16.0	-31.3
10,000-16,999 Btu/hr.	48.5	70.7	- 31.4	16.8	25.0	-32.8
17,000 Btu/hr. and over	46.5	109.7	- 57.6	18.3	40.9	-55.3
Vacuum cleaners, electro-mechanical	332.3	300.4	+ 10.6	33.4	32.4	+ 3.1
Floor polishers, electro-mechanical and parts thereof	na	na	--	14.1	11.1	+27.0
Gas water heaters	49.2	43.6	+ 12.8	6.7	7.0	- 4.3

na not available.
nspf not specially provided for.
* Value is equivalent to f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the carrier as well as freight, insurance and any other charges or transportation costs beyond the port of exportation.

Source: U.S. Dept. of Commerce,
U.S. General Exports (FT 410),
December, 1983, 1984.

FOREIGN TRADE

Import Penetration

Total Apparent Consumption of Selected Major Appliances in the U.S., 1984 & Imports' Share of the Total

	Apparent U.S. Consumption*		Imports % To Total Apparent U.S. Consumption	
	Quantity (Thous.)	Value (Mil. $)	Quantity	Value
Electric ranges and ovens, other than microwave	3,516.7	$1,148.0	7%	6%
Microwave ranges, ovens	9,877.4	1,822.9	45	33
Refrigerators and combination refrigerator-freezers	7,475.9	2,637.9	17	6
Food freezers, household type	1,234.2	294.9	8	8
Washing machines, household type	5,023.0	1,333.8	1	1

* Apparent consumption equals U.S. production less exports plus imports.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Major Household Appliances, 1984 (MA36F).

PRODUCER PRICES

Major appliance prices at the factory level rose moderately in 1984, an annual increase of 2.3%. This figure was in line with producer price gains for all commodities and for all household appliances. The price indexes for upright home freezers and vacuum cleaners declined for the year.

Producer (Factory) Price Indexes For Specified Major Appliances
1983, 1984 and June 1984, 1985
(1967=100 unless otherwise indicated)

	June Monthly Average			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All commodities	309.5	311.4	- 0.6%	310.3	303.1	+ 2.4%
Household appliances	212.6	211.1	+ 0.7	211.0	206.9	+ 2.0
Major appliances	217.9	216.1	+ 0.8	216.1	211.3	+ 2.3
Cooking equipment	236.1	232.2	+ 1.7	232.6	226.2	+ 2.8
Free standing electric ranges	258.4	252.4	+ 2.4	252.6	241.9	+ 4.4
Built-in surface cooking tops, electric	236.1	230.4	+ 2.5	230.7	227.1	+ 1.6
Portable microwave ovens (12/78=100)	92.1	99.5	- 7.4	98.5	na	--
Drop-in electric ranges	na	116.2	--	116.4	113.8	+ 2.3
Free-standing gas ranges	286.6	262.2	+ 2.4	262.8	253.6	+ 3.6
Nonstandard type gas ranges (6/81=100)	124.7	120.8	+ 3.2	121.6	115.7	+ 5.1

(continued)

Producer (Factory) Price Indexes For Specified Major Appliances 1983, 1984 and June 1984, 1985

(1967=100 unless otherwise indicated)
(continued)

	June Monthly Average			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Laundry equipment	220.5	218.1	+ 1.1%	218.6	213.4	+ 2.4%
Washing machines, automatic	209.6	207.2	+ 1.2	208.1	203.5	+ 2.3
Electric dryers	240.5	239.1	+ 0.6	238.7	232.5	+ 2.7
Refrigeration equipment	208.4	207.6	+ 0.4	207.6	203.4	+ 2.1
Refrigerator-freezer, 14.4 cubic feet and under (12/81=100)	110.6	110.2	+ 0.4	109.6	108.9	+ 0.6
Home freezer, upright type	193.7	203.5	- 4.8	204.9	205.6	- 0.3
Other major appliances	200.7	200.2	+ 0.2	198.8	195.4	+ 1.7
Room air conditioners	180.5	178.5	+ 1.1	176.4	174.5	+ 1.1
Dishwasher, undercounter	195.1	197.3	- 1.1	197.0	192.5	+ 2.3
Vacuum cleaners, including parts and attachments	172.2	167.5	+ 2.8	166.4	167.0	- 0.4

na not available.

Source: U.S. Bureau of Labor Statistics.

THE CONTRACT MARKET FOR MAJOR APPLIANCES

In 1984, nearly 95% of all new one-family homes came equipped with a stove, 90.5% had a dishwasher, and 22.2% contained a refrigerator. These figures reflect a trend toward more and more new houses being equipped with these appliances. In 1978, for example, only 84% came with dishwashers, and 11% with refrigerators.

The contract market for all three major appliances is strongest in the South, due to that region's clear dominance in new housing construction. However, in terms of the percent of new houses in each region that have these appliances, the West leads the way in stoves (98.8%) and dishwashers (95.6%), while the Northeast is the leader in refrigerators (34.0%). For the most part, the more expensive the house the greater the likelihood that it will contain major appliances.

Selected Appliances Included in the Sale Price of New One-Family Houses, by Region, 1983, 1984

	1984		1983	
	Number of Houses (Thous.)	% of Total	Number of Houses (Thous.)	% of Total
U.S. total	639	100.0%	623	100.0%
Appliances:				
Stove	606	94.8	586	94.1
Dishwasher	578	90.5	552	88.6
Refrigerator	142	22.2	130	20.9
Northeast, total	94	100.0	76	100.0
Appliances:				
Stove	89	94.7	70	92.1
Dishwasher	78	83.0	61	80.3
Refrigerator	32	34.0	24	31.6
Midwest, total	76	100.0%	71	100.0%
Appliances:				
Stove	58	76.3	51	71.8
Dishwasher	63	82.9	57	80.3
Refrigerator	16	21.1	13	18.3
South, total	309	100.0	323	100.0
Appliances:				
Stove	302	97.7	315	97.5
Dishwasher	283	91.6	295	91.3
Refrigerator	81	26.2	81	25.1
West, total	160	100.0	152	100.0
Appliances:				
Stove	158	98.8	149	98.0
Dishwasher	153	95.6	139	91.4
Refrigerator	14	8.8	13	8.6

Source: U.S. Bureau of the Census, Characteristics of New Housing: 1984, C25-84-13.

Selected Appliances Included in New One-Family Houses By Sales Price, 1984

	Percent of Houses Sold With:		
	Stoves	Dishwashers	Refrigerators
Sale price of house:			
Under $50,000	80.9%	59.6%	19.1%
$50,000-$59,999	92.0	78.7	24.0
$60,000-$79,999	95.0	91.5	22.1
$80,000-$99,999	96.0	96.0	21.4
$100,000-$119,999	96.5	96.5	21.1
$120,000 & over	98.5	97.1	23.5

(continued)

THE CONTRACT MARKET FOR MAJOR APPLIANCES

Selected Appliances Included in New One-Family Houses By Sales Price, 1984
(continued)

	Percent of Houses Sold With:		
	Stoves	Dishwashers	Refrigerators
Average price of house:			
With specified appliances	$99,000	$101,000	$100,600
Without specified appliance	70,800	64,900	96,600
Median price of house:			
With specified appliance	80,900	82,700	79,800
Without specified appliance	65,000	53,000	79,900

Source: U.S. Bureau of the Census,
Characteristics of New Housing: 1984,
C25-84-13.

In addition to the new-house market for major appliances, a large market also exists, of course, in motels, hospitals, schools and other institutions. This Fact File is, however, concerned with the household market for home appliances and does not cover these contract markets.

MAJOR APPLIANCE OWNERSHIP

Major Home Appliance Ownership in U.S. Households, 1982

	Number of Households (in millions)	% of Total
U.S. total	83.5	100.0%
Refrigerators	83.4	99.9
Washers	61.5	73.6
Dryers	54.6	65.3
Electric ranges	48.4	58.0
Disposers	41.5	49.7
Dishwashers	37.2	44.5
Freezers	35.7	42.8
Gas ranges	35.7	42.7
Room air conditioners	22.6	27.0
Microwave ovens	21.4	25.6
Dehumidifiers	9.2	11.0
Compactors	2.6	3.1

Source: Association of Home Appliance Manufacturers,
Major Appliance Industry Fact Book 1985.

GENERAL STATISTICS ON THE ELECTRIC HOUSEWARES INDUSTRY

As noted in the introductory section of this Fact File covering General Statistics on Major Appliances & Electric Housewares, industry data on a combined basis is reported by the Census Bureau and other government sources. However, separate figures for the electric housewares segment are covered in this section, where available.

The 1982 census of manufactures indicates the shipments by those manufacturers classified in the electric housewares and fans industry totaled $3.2 billion, a 24.7% increase in current dollars (not accounting for inflation) from the prior census five years earlier. Capital expenditures in the industry more than doubled.

Electric Housewares & Fans (SIC 3634*)

	1982	1977	% Change 1982/1977
Number of companies	218	239	- 8.8%
Number of establishments, total**	263	291	- 9.6
Number with 20 or more employees	134	148	- 9.5
Employees, total (thous.)	38.7	47.3	- 18.2
Production workers (thous.)	29.3	37.6	- 22.1
Payroll (mil. $)	$ 539.1	$ 458.7	+ 17.5
Value added by manufacture# (mil. $)	1,538.5	1,365.7	+ 12.7
Value of industry shipments## (mil. $)	3,155.7	2,531.2	+ 24.7
Capital expenditures, new (mil. $)	73.0	47.8	+ 52.7

* SIC 3634 includes establishments primarily engaged in manufacturing electric housewares for heating, cooking, and other purposes. Important products of this industry include electric air heaters, fans, electrically heated bed coverings, blenders, broilers, deep fat fryers, flat irons, food mixers, hot plates, percolators, coffee makers and roasters. Also included in this industry are personal care electrics: hair curlers, hair dryers, massage machines, electric razors, sauna heaters, electric toothbrushes and water pulsating devices.

** Each business location is counted as a separate establishment.

# Value added by manufacture is derived by subtracting the total cost of materials (including supplies, fuel, electric energy, cost of resales and miscellaneous receipts) from the value of shipments (including resales) and other receipts and adjusting the resulting amount by net change in finished products and work-in-process inventories between the beginning and end of year.

## Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. It includes receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It also includes both primary and secondary products made in the industry. Value of product shipments by all producers (including secondary manufacturers of electric housewares) is covered on pages 26-30.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series MC-82-I-36B.

GENERAL STATISTICS ON THE ELECTRIC HOUSEWARES INDUSTRY

Employment & Earnings

Employment & Earnings in the Electric Housewares & Fans Industry

	August Monthly Averages			Annual Averages		
	1985(p)	1984	% Change 1985/84	1984	1983	% Change 1984/83
Electric housewares & fans (SIC 3634)						
All employees (thous.)	36.8	40.4	- 8.9%	39.7	40.1	- 1.0%
Production workers (thous.)	28.4	31.5	- 9.8	30.7	30.5	+ 0.7
Average weekly earnings	$283.29	$264.32	+ 7.2	$270.36	$262.80	+ 2.9
Average hourly earnings	$ 7.10	$ 6.76	+ 5.0	$ 6.81	$ 6.67	+ 2.1
Average weekly hours	39.9	39.1	+ 2.0	39.7	39.4	+ 0.8

(p) preliminary.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Concentration in the Industry

Number of Manufacturing Plants in the Electric Housewares & Fans Industry By Employment Size, 1982

(Includes only establishments with payrolls)

	Electric Housewares & Fans (SIC 3634)	
	Number	% of Total
Total plants	242	100.0%
Number by employment size		
Under 20 employees	110	45.5
20-99 employees	53	21.9
100-499 employees	54	22.3
500 or more employees	25	10.3

Source: U.S. Bureau of the Census, County Business Patterns 1982.

Location of the Industry

Leading States in the Electric Housewares Industry, 1982

	Establishments		Value of Industry Shipments (Mil. $)
	Total	No. with 20+ Employees	
Electric housewares & fans (SIC 3634), total			
Leading states:			
New York	25	12	$ 234.4
California	25	9	69.8
Ohio	12	6	284.5
Tennessee	11	9	363.8
Wisconsin	11	6	347.0
Pennsylvania	11	6	229.4

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series MC-82-I-36B.

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Shipments of electric housewares and fans by all domestic producers was valued at nearly $2.9 billion based on data from the 1982 Annual Survey of Manufactures. This figure constitutes shipments by all producers of this merchandise, regardless of their industry classification. It is 1.8% higher than the value reported for 1982 but 6.4% lower than the level achieved in 1980 before the recession took hold.

Value of Shipments of Electric Housewares and Fans
By All U.S. Producers, 1980-1983
(Millions of dollars)

	1983	1982	1981	1980	% Change 1983/1980
Electric housweares and fans, total	$2,895.8	$2,845.6	$2,874.1	$3,093.7	- 6.4%
Electric fans, excluding industrial type	558.1	592.3	648.7	700.6	-20.3
Small electric household appliances	2,043.6	1,977.3	1,997.8	2,135.9	- 4.3
Parts for small appliances	223.9	210.6	167.3	187.2	+19.6
Electric housewares & fans, n.s.k.	70.2	65.4	60.3	70.0	+ 0.3

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures,
Value of Product Shipments M83(AS)-2.

Detailed data on the production of electric housewares and fans is provided in the Current Industrial Reports pertaining to the industry. The Census Bureau has interviewed all known manufacturers of these products (approximately 125 companies) for the annual reports.

Quantity & Value of Shipments of Electric Housewares and Fans
By Product, 1983, 1984

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
	1984	1984	1983	1984	1983	1984/83
Electric housewares and fans total	125	--	--	$2,629.3	$2,528.4	+ 4.0%
Electric housewares, total (excluding parts)*	90	--	--	2,048.3	1,966.5	+ 4.2
Food preparation appliances:						
Broilers with or without rotisseries	8	527.5	793.2	19.3	29.5	-34.6
Automatic coffee makers, total	na	14,605.8	13,676.5	306.8	264.9	+15.8
Drip type	12	10,955.9	9,675.0	246.8	201.0	+22.8
Percolator or vacuum type	7	2,761.2	3,091.7	39.2	44.0	-10.9
Urn type	5	889.0	909.8	20.8	19.9	+ 4.5

(continued)

Quantity & Value of Shipments of Electric Housewares and Fans By Product, 1983, 1984

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
	1984	1984	1983	1984	1983	1984/83
Food preparation appliances: (cont'd.)						
Deep fat fryers	8	1,657.9	1,758.1	$ 20.0	20.6	- 2.9%
Ovens and roasters, with or without broilers	9	3,473.6	2,982.6	151.0	124.3	+21.5
Hot plates and disc stoves (1,650 watts or less)	10	1,326.3	1,325.9	18.4	17.8	+ 3.4
Automatic toasters	7	7,894.9	6,467.8	100.4	88.7	+13.2
Waffle irons, sandwich grills, griddles and combinations	13	1,719.2	1,401.0	39.6	33.0	+20.0
Frying pans (skillets)	9	3,016.4	3,225.1	63.6	73.6	-13.6
Corn poppers, total	na	3,637.9	3,413.8	41.8	41.3	+ 1.2
Hot-air type	4	2,715.4	2,441.2	30.7	29.8	+ 3.0
Other than hot-air type	7	922.5	972.6	11.1	11.5	- 3.5
Household food processors	7	1,658.2	1,800.4	66.2	79.5	-16.7
Household food mixers, total	na	8,470.6	8,022.3	216.9	232.8	- 6.8
Hand (portable)	7	3,183.0	2,514.0	34.4	29.8	+15.4
Stand type	4	1,212.6	1,441.0	93.3	114.9	-18.8
Blenders (liquefiers)	4	4,075.1	4,067.3	89.2	88.0	+1.4
Ice crushers	4					
Household food preparation appliances, except mixers	13	1,363.8	2,414.5	31.8	54.1	-41.2
Can openers	8	5,880.0	4,833.2	72.4	60.2	+20.3
Electric irons, standard household types	na	8,219.4	7,279.3	111.5	95.6	+16.6
Electric blankets	3	4,939.9	4,735.0	128.6	122.0	+ 5.4
Electric heating pads	8	3,816.1	3,926.2	29.8	29.0	+ 2.8
Hair dryers	na	567.0	882.8	5.4	12.7	- 57.5
Other small electric appliances, including curling irons, vibrators, portable dehumidifiers	32	na	na	135.8	160.4	-15.3
Portable humidifiers	10	2,978.2	2,877.4	31.1	34.2	- 9.1
Air space heaters, total	na	8,665.4	7,312.2	205.7	174.1	+18.2
Portable room heaters:						
Fan forced type	16	3,743.7	2,778.4	75.0	54.3	+38.1
Other than fan forced (convector, radiant)	14	1,132.0	1,094.4	27.6	26.0	+ 6.2
For fixed installations, all types:						
Baseboard, except glass panel	13	2,375.6	2,075.1	49.7	44.3	+12.2
Other than baseboard	14	1,414.0	1,364.3	53.4	49.5	+ 7.9

(continued)

Quantity & Value of Shipments of Electric Housewares and Fans By Product, 1983, 1984

(continued)

	No. of U.S. Producers 1984	Quantity (Thous. Units) 1984	Quantity (Thous. Units) 1983	Value (Mil. $) 1984	Value (Mil. $) 1983	% Change 1984/83
Electric fans, except industrial	35	22,845.9	21,313.9	$581.0	$561.9	+ 3.4%
Desk & wall bracket	na	4,857.2	5,388.3	76.7	83.9	- 8.6
Window (household) permanent type	na	462.4	483.1	13.0	14.0	- 7.1
Portable window fans	7	7,102.9	5,449.6	110.1	82.0	+32.7
Roll abouts	2					
Electric range hoods, total	na	2,431.7	2,047.2	96.7	81.9	+18.1
Ducted	13	1,156.0	1,045.6	56.7	50.4	+12.5
Nonducted	11	1,275.6	1,001.7	40.0	31.5	+27.0
Oven hoods	3	96.7	94.1	6.0	5.4	+11.1
Ceiling fans	15	5,510.1	5,686.1	225.5	250.5	-10.0
All other household type ventilating and exhaust fans	4	2,3850	2,165.5	53.1	43.3	+22.6
All other electric fans	5					

* Includes electric housewares not separately reported, such as shavers, knives, toothbrushes, etc.

na not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Electric Housewares & Fans, MA36E(84)-1.

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Electric Housewares, 1982 & 1983

	1983	1982
Blenders		
Sunbeam (Northern Electric, Oster)	42%	40%
Scovill (Hamilton Beach)	29	30
Dynamics Corp. (Waring)	23	24
All others	6	6
Drip Coffee Makers		
North American Systems (Mr. Coffee)	26%	39%
North American Philips (Norelco)	22	21
General Electric	16	17
Proctor-Silex	12	10
All others	24	13

	1983	1982
Can Openers		
Rival	40%	43%
General Electric	22	24
Sunbean	18	18
All others	20	15
Percolator Coffee Makers		
Faberware	33%	22%
Regal Ware	33	40
West Bend	17	10
General Electric	10	10
All others	7	18

(continued)

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Electric Housewares, 1982 & 1983

(continued)

Food Processors	1983	1982
Cuisinart	30%	35%
General Electric	20	15
Hamilton Beach	20	17
Moulinex Regal	15	12
All others	15	21

Toasters	1983	1982
Proctor-Silex	39%	56%
Toastmaker	32	21
General Electric	19	17
All others	10	6

Irons	1983	1982
General Electric	55%	56%
Proctor-Silex	22	20
Sunbeam	14	14
Scovill	10	10

Toaster Ovens	1983	1982
General Electric	58%	62%
Toastmaster	18	8
Proctor-Silex	15	19
All others	9	11

Source: Appliance Manufacturer,
8th Annual Appliance Industry Marketing Guide-1984
(All rights reserved).

Distribution of Manufacturers' Sales

Data supplied by the National Housewares Manufacturers Association shows that 83% of housewares manufacturers' sales in 1984 were to retail outlets. The remaining 17% went to wholesale outlets, the lowest incidence of sales to wholesalers in the past eighteen years. These findings are based on the responses of 578 manufacturers to the NHMA's 18th Annual Marketing Research Study. The survey, conducted by B. Angell & Associates, solicits industry information from all types of housewares manufacturers, not just those manufacturing electric housewares.

Percent of Total Dollar Sales By Housewares Manufacturers To Retail Outlets, 1983, 1984

Retail Outlets (83% of Total)	1984	1983	1982
Mass Merchandisers	38%	30%	28%
Department Stores	10	8	9
Catalog Showrooms	9	9	12
Food Stores	7	6	5
Drug Stores	5	5	6
Housewares/Hardware Stores	3	5	5
Variety Stores	2	4	3
Mail Order	2	3	na
Home Centers	2	2	na
All other	5	7	na

na not available.

Source: National Housewares Manufacturers Association, 18th Annual Marketing Research Study of Housewares Manufacturers, 1984.

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Distribution of Manufacturers' Sales

The survey also reveals the high unit costs of electric houseware products. While only 11% of all houseware manufacturers fall into this category, it accounts for one-third of all sales, by far the largest segment. The largest group of housewares manufacturers, based on the survey, are those producing decorative accessories products (12% of the total).

FOREIGN TRADE IN ELECTRIC HOUSEWARES

Imports

The labor-intensive nature of electric housewares production--with fewer variations in design and size than major appliances--has facilitated the penetration of imports into the marketplace. Foreign goods accounted for 48% by value of apparent consumption of fans, 42% of electric irons, and 28% of space heaters.

Quantity & Value of Imports of
Specified Electric Housewares, 1983 & 1984

	Quantity (Thous. Units)			C.I.F. Value* (Mil. $)		
	1984	1983	% Change 1984/83	1984	1983	% Change 1984/83
Toasters	523.7	289.5	+80.9%	$ 5.4	$ 3.2	+ 68.8%
Coffee makers	1,861.1	950.9	+95.7	39.5	16.6	+138.0
Electro-mechanical food blenders, food mixers and juice extractors	3,468.7	2,645.6	+31.1	35.4	25.4	+ 39.4
Electro-mechanical food grinders, slicers and choppers	1,080.3	1,227.4	-12.0	19.9	21.5	- 7.4
Portable cooking and food-warming appliances, nspf	1,451.6	2,177.9	-33.3	28.8	26.4	+ 9.1
Electro-mechanical appliances, nspf	2,165.6	1,551.6	+39.6	63.8	49.0	+ 30.2
Electrothermic appliances, nspf	8,436.1	9,600.5	-12.1	80.6	83.7	- 3.7
Flat irons, electric	7,613.6	6,675.3	+14.1	81.4	65.0	+ 25.2
Electric shavers	5,362.6	4,014.1	+ 3.6	77.4	59.8	+ 29.4
Electric hair dryers	19,746.1	19,110.8	+33.3	113.0	109.7	+ 3.0
Electric hair curlers	na	na	--	61.8	68.8	- 10.2
Electric hair care appliances, nspf	na	na	--	55.2	43.3	+ 27.5

na not available. nspf not specially provided for.

* The C.I.F. (cost, insurance, freight) value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, as well as all freight, insurance and other charges (excluding U.S. import duties), incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Department of Commerce,
U.S. General Imports (FT135),
December 1983, 1984.

FOREIGN TRADE IN ELECTRIC HOUSEWARES

Exports

Canada, Saudi Arabia, Mexico, the United Kingdom, and West Germany were the major export markets for U.S. producers in 1983. Canada and Saudi Arabia accounted for 23% and 13% of the shares, respectively for that year. Exports of portable household cooking equipment, including food or plate warmers, more than doubled in 1984 in both quantity and value, as the result of an enormous increase in exports of these products to Canada.

Quantity & Value of Exports of Specified Electric Housewares, 1983 & 1984

	Quantity (Thous. Units)			Value* (Mil. $)		
	1984	1983	% Change 1984/83	1984	1983	% Change 1984/83
Toasters	816.5	940.7	-13.2%	$11.8	$15.6	- 24.4%
Coffee makers	721.3	885.7	-18.6	14.3	13.7	+ 4.4
Portable household cooking apparatus, including food or plate warmers, of base metal	826.4	326.6	+153.0	33.0	14.7	+124.5
Electro-mechanical food blenders, mixers and juice extractors	440.2	505.5	-12.9	12.8	13.8	- 7.2
Food grinders, slicers and choppers, electro-mechanical	59.2	128.3	-53.9	3.3	5.4	- 38.9
Can openers, including combination units, electro-mechanical	177.4	150.5	+17.9	2.3	1.8	+ 27.8
Portable electrothermic kitchen and household appliances	459.2	451.5	+ 1.7	15.3	14.7	+ 4.1
Electro-mechanical appliances, nsfp	531.0	499.4	+ 6.3	18.5	18.7	- 1.1
Flat irons, electric	452.8	577.8	-21.6	4.7	5.8	- 19.0
Electric shavers	447.7	367.4	+21.9	5.3	3.8	+ 39.5
Hairdressing appliances, electric	na	na	--	2.1	2.9	- 27.6

na not available. nspf not specially provided for.

* Value is equivalent to f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the carrier as well as freight, insurance and any other charges beyond the port of exportation.

Source: U.S. Department of Commerce,
U.S. General Exports (FT410),
December 1983, 1984.

TOP HOUSEWARES SUPPLIERS

The following is a listing of the leading housewares producers based in the United States. The firms were ranked by their estimated sales volume worldwide, as of January 1985. Sales volume was defined as the company's annual revenue derived from housewares products that moved through traditional retail channels, including department stores, mass merchants, and hardware stores.

Allegheny International and Black & Decker ranked first and second, respectively, in 1984. These are the same positions that they held in 1983. Allegheny International recorded estimated housewares sales of $900 million for the year, more than one-third of it outside the U.S. The firm's Sunbeam and Oster lines are enabling it to challenge Black & Decker for leadership in the small appliance market. Black & Decker, on the other hand, is continuing the integration of General Electric's housewares products into its own lines.

Top Housewares Suppliers, 1984

Rank	Company (and headquarters)	Estimated Housewares Sales (in millions)
1	Allegheny International, Pittsburgh, PA	$ 900
2	Black & Decker Corp. Towson, MD	600-650
3	Hoover Co., North Canton, OH	490
4	Corning Glass Works, Corning, NY	400
5	Rubbermaid, Inc., Wooster, OH	400
6	Norelco Consumer Products, Stamford, CN	325
7	Anchor Hocking Corp., Lancaster, OH	320
8	Eureka Co., Bloomington, IL	275
9	Wear-Ever/Proctor-Silex, Chillicothe, OH	250
10	Kidde, Inc., Saddle Brook, NJ	225-250
11	Dart & Kraft, Northbrook, IL	225
12	Ekco Group, Inc., Franklin Park, IL	220
13	Newell Cos., Inc., Freeport, IL	180-190
14	Regal Ware, Inc., Kewaskum, WI	180-190
15	Hamilton Beach, Waterbury, CN	180

Source: "The Top 50 Housewares Suppliers", HFD - Retailing Home Furnishings, Sept. 30, 1985

MAJOR APPLIANCES & ELECTRIC HOUSEWARES

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Privately-owned housing starts during the first six months of 1985, were off 6.5% from the same period in 1984. This comes on the heels of a 2.7 annual increase from 1983 to 1984. Since approximately a quarter of all major appliance sales are made to builders, the downturn this year must be viewed with some concern by the industry, despite the Commerce Department's prediction of renewed improvement in starts before the end of the year.

New Privately Owned Housing Units Started, 1983, 1984 and January-June 1984, 1985
(Thousands of units, seasonally adjusted)

	January-June Starts			Annual Starts		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Privately-owned housing starts	854.4	914.1	- 6.5%	1,749.5	1,703.0	+ 2.7%

Source: U.S. Bureau of the Census,
Construction Reports Division.

New Privately Owned Housing Units Authorized, 1983, 1984 and January-June 1984, 1985
(Thousands of units)

	January-June Authorizations			Annual Authorizations		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Privately-owned housing starts	845.3	899.1	- 6.0%	1,660.1	1,605.2	+ 3.4%

Source: U.S. Bureau of the Census,
Construction Reports Division.

The average U.S. household had a reported income of $25,401 in 1983, led by households with a person aged 45-54 as its head. The proliferation of two-income families has endowed these families with rising levels of discretionary income, a part of which they are targeting for the purchase of appliances and housewares (see section on Consumer Buying Habits).

Total Money Income of Households by Age of Householder, 1983
(Number of households as of March 1984)

		Age of Householder					
	Total	15-24	25-34	35-44	45-54	55-64	65 & over
Number of households (000)	85,407	5,510	19,808	16,596	12,471	13,121	17,901
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total money income:							
Under $10,000	22.9	35.9	17.2	12.5	13.5	21.3	42.6
$10,000-$19,999	25.0	35.2	27.5	20.1	17.2	22.6	30.8
$20,000-$29,999	20.0	19.2	25.5	22.1	18.6	19.7	13.6
$30,000-$39,999	13.7	6.3	16.3	18.1	17.5	14.2	6.0
$40,000-$49,999	8.1	2.0	7.6	11.9	12.8	8.8	3.3
$50,000-$74,999	7.4	1.2	4.9	11.2	14.1	9.4	2.6
$75,000 & over	2.8	0.1	1.1	4.1	6.3	4.0	1.1
Median income	$20,885	$13,401	$21,740	$27,679	$30,351	$22,777	$11,718
Mean income	25,401	15,451	24,121	31,442	34,203	27,807	16,386

Source: U.S. Bureau of the Census,
Current Population Reports,
Consumer Income P-60 No. 146.

The South accounted for the bulk of new housing starts in the nation in 1984, though construction in that region has declined as a percent of the U.S. total. The Northeast and West have increased their shares of the new housing market, with both areas attaining their highest levels of the decade. The Midwest has rebounded from four consecutive years of a declining share, though the area has not returned to its 1980 level.

Location of New Housing Starts In the U.S., 1980-1984

	1984	1983	1982	1981	1980
U.S. Total	1,749.5	1,703.0	1,062.0	1,084.2	1,292.2
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Northeast	11.7	9.8	11.0	10.8	9.7
Midwest	13.9	12.8	14.0	15.2	16.9
South	49.5	54.9	55.6	51.8	49.7
West	24.9	22.4	19.3	22.1	23.7

Source: U.S. Bureau of the Census,
Construction Reports Division.

THE CONSUMER MARKET

The total value at retail of all major appliances and electric housewares reaching consumers was nearly $24.3 billion in 1984, an 11.2% gain for the year. In constrast, the annual rate of increase for 1982, in the midst of the U.S. recession, was just 2.1%

This figure covers the retail value spent on these goods by consumers through a variety of channels, such as retail outlets. Also included are direct sales by manufacturers, premiums and the value of the goods in new privately-owned housing units. Not included are sales to the institutional market, such as hospitals and schools.

Personal Consumption Expenditures For Major Appliances & Electric Housewares, 1981-1984
(Millions of dollars)

1984(p)	1983(p)	1982(r)	1981(r)	% Change 1984/1983
$24,276	$21,837	$19,911	$19,508	+ 11.2%

(p) preliminary (r) revised

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

Household Expenditures For Appliances & Housewares

In April 1985, the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor issued a report based on its 1980-81 Consumer Expenditure Survey. The report contains data, averaged for the two years, on urban household expenditures for major appliances and small appliances/miscellaneous housewares. Unlike the data on Personal Consumption Expenditures compiled by the U.S. Census Bureau, the BLS surveys cover direct purchases only, and do not include, for example, the value of appliances in new housing units.

The BLS surveys show average annual expenditures per household in terms of various demographic considerations such as the age of the householder, the household's income before taxes, and housing tenure (homeowner vs. renter). Projections made by Fairchild reveal the propensity of those in different classifications to make purchases. For example, expenditures on small appliances/miscellaneous housewares were led by households whose head was in the 55-64 age group. They had a reported 26.3% share of these purchases, reflecting their propensity for gift giving, though these households accounted for just 15.2% of the total number of households. In another instance 61.5% of those interviewed were homeowners while 38.5% were renters. In purchasing major appliances, however, the homeowners accounted for a nearly 80% share to just 20.5% for renters.

Urban Household Expenditures For Appliances & Housewares, 1980-81 Average

By Age of Householder

	Total	Under 25	25-34	35-44	45-54	55-64	65 & Over
Number of consumer units (thous.)	68,295	7,408	16,083	11,422	9,685	10,410	13,287
Percent of Total	100.0%	10.8%	23.6%	16.7%	14.2%	15.2%	19.5%
Average age of householder (years)	46.2	21.6	29.5	39.2	49.5	59.3	73.6
Average size of household (persons)	2.7	1.8	2.8	3.8	3.4	2.4	1.7
Average household income (after taxes)	$17,483	$10,092	$18,222	$22,307	$24,474	$19,115	$10,162
Average expenditure per household:							
Major appliances	$ 129	$ 84	$ 150	$ 151	$ 175	$ 118	$ 87
Small appliances/miscellaneous housewares	$ 60	$ 41	$ 60	$ 75	$ 75	$ 75	$ 34

By Household Income Before Taxes

	Total	$30,000 & Over	$20,000 29,999	$15,000 19,999	$10,000 14,999	Under $10,000
Number of consumer units (thous.)	68,295	11,997	12,165	7,426	8,357	17,412
Percent of Total	100.0%	17.5%	17.8%	10.9%	12.2%	25.5%
Average age of householder (years)	46.2	44.5	41.4	42.1	43.2	51.0
Average size of household (persons)	2.7	3.4	3.1	2.7	2.5	1.9
Average household income (after taxes)	$17,483	$37,468	$21,190	$15,654	$11,281	$ 4,904
Average expenditure per household:						
Major appliances	$ 129	$ 226	$ 166	$ 126	$ 103	$ 59
Small appliances/miscellaneous housewares	$ 60	$ 114	$ 71	$ 55	$ 44	$ 27

* Total includes 10.9 thousand households for which income was not reported.

By Housing Tenure

	Total	Homeowner	Renter
Number of consumer units (thous.)	68,295	41,990	26,305
Percent of Total	100.0%*	61.5%	38.5%
Average age of householder (years)	46.2	50.5	39.4
Average size of household (persons)	2.7	3.0	2.2
Average household income (after taxes)	$17,483	$21,307	$11,642
Average expenditure per household:			
Major appliances	$ 129	$ 167	$ 69
Small appliances/miscellaneous housewares	$ 60	$ 72	$ 40

Projected Total Expenditures of Urban Households, 1980-81 Average

	Major Appliances	Small Appliances/ Miscellaneous Housewares
By age of householder:		
Total	100.0%	100.0%
Under 25	7.0	6.6
25-34	27.3	21.1
35-44	19.5	18.7
45-54	19.1	17.1
55-64	14.0	26.3
65 & over	13.1	10.2
By income before taxes of household:		
Total	100.0*	100.0*
$30,000 & over	30.7	33.3
$20,000-29,999	22.9	21.0
$15,000-19,999	10.6	10.0
$10,000-14,999	9.8	9.0
Under $10,000	11.7	11.5
By housing tenure of householder:		
Total	100.0	100.0
Homeowner	79.5	74.1
Renter	20.5	25.9

* Total includes households for which income was not reported.

Major appliances includes refrigerators, freezers, dishwashers, stoves, ovens, garbage disposals, vacuum cleaners, microwaves, air conditioners, sewing machines, washing machines, dryers, and floor cleaning equipment.

Small appliances/miscellaneous housewares includes small electrical kitchen appliances,portable heating and cooling equipment, china and other dinnerware, flatware, glassware, silver and other serving pieces, non-electric cookware, and plastic dinnerware. Excludes personal care appliances.

Source: Fairchild Market Research Division based on
Consumer Expenditure Survey, 1980-81,
Bulletin 2225, April 1985.

RETAIL SALES BY TYPE OF OUTLET

The Bureau of the Census has recently released reports on retail sales of specific major merchandise categories by type of retail outlet as a result of the complete census of retail trade covering operations in 1982. The merchandise line information includes sales in establishments with payroll, which, of course, provides quite complete coverage of the major appliance/ electric housewares retail market.

A complete census of retail trade is compiled by the Census Bureau every five years and it provides the only available information on merchandise line sales in all types of retail outlets.

According to the 1982 census, retail establishments selling major appliances numbered 61,383; those selling small electric appliances (electric housewares) totaled 69,910. Sales of major appliances were reported at $11.4 billion; of small electric appliances, $4.4 billion.

Due to a change in the method of classifying leased departments, direct comparisons cannot be made with findings on retail stores and merchandise line sales in 1977 and in 1982. In the 1977 census, leased departments were not reported as separate operations but were combined in the data for the store in which operated. In the 1982 census, however, leased departments are classified as separate establishments in their specialized kind of business.

Following the prevailing methodology, in the 1977 census of retail trade establishments with payroll which sold major appliances were reported at 71,966; stores selling electric housewares, 81,725.

Sales of major appliances in 1982 through retail outlets were up 23.5% over the $9.2 billion reported for 1977. Sales of electric housewares in 1982 gained 53.7% over the reported 1977 total of $2.8 billion. It should be noted that the sales figures are on a current dollar basis and inflation must be taken into consideration in evaluating sales gains. (It should also be kept in mind that major appliances reaching the consumer through other than covered retail channels are not included in the sales figures.)

As classified by the Census Bureau, household appliance stores and department stores held an almost-equal share of total major appliance retail sales in 1982 (about 32%), and were by far the dominant outlet types.

Major Household Appliance Sales By Leading Retail Outlet Types, 1982

	No. of Establishments	Sales (thous. $)	Percent of Sales
Major household appliances	61,383	$ 11,336,558	100.0%
Leading outlet types:			
Building materials, hardware, garden supply, mobile home dealers	9,008	479,756	4.2
Department stores	6,286	3,585,980	31.6
Furniture stores	10,270	831,595	7.3
Household appliance stores	10,239	3,625,163	32.0
Radio/television stores	2,691	634,021	5.6
Nonstore retailers:			
Mail order houses*	3,318	510,137	4.5
Direct sellers	1,952	576,671	5.1
All other outlets	17,619	1,093,235	9.7

(continued)

RETAIL SALES BY TYPE OF OUTLET

(Footnote continued)

* Sales from catalog order desks in department stores or other outlets are included in data on the specific store type in which operated. Stores operated by mail order chains, such as Sears, are counted in the specific store classification defining their operations under SIC definitions.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Small Electric Appliance Sales By Leading Retail Outlet Types, 1982

	No. of Establishments	Sales (thous. $)	Percent of Sales
Small electric housewares	69,910	$ 4,380,812	100.0%
Leading outlet types:			
Building materials, hardware, garden supply, mobile home dealers	10,702	243,553	5.6
Department stores	8,891	2,115,475	48.3
Variety and other general merchandise stores	14,308	730,457	16.4
Grocery stores	3,995	201,735	4.6
Household appliance stores	1,758	141,502	3.2
Drug stores	14,559	561,945	12.8
Nonstore retailers:			
Mail order houses*	3,098	153,560	3.5
All other outlets	12,599	232,585	5.6

* See footnote on above table.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Appliance Store Sales of Major Appliances/Electric Housewares

In reporting on merchandise line sales in 1982, based on a complete census of retail trade, the U.S. Bureau of the Census has included the following information on major appliance and small electric appliance sales in appliance stores with payroll.

Major Appliance & Small Electric Appliance Sales in Household Appliance Stores, 1982

	Established Selling Merchandise Line	Sales of Specified Merchandise Line		
		Total (thous.) $	% of Total Sales of: Stores Selling Line	All Appliance Stores
Major appliances	10,239	$3,625,163	64.7%	63.6%
Kitchen appliances	8,198	2,019,581	39.5	35.4
Laundry appliances	6,969	886,145	20.0	15.6
Other major household appliances	7,631	719,437	16.9	12.6
Small electric appliances	1,758	141,502	10.9	2.5

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY OUTLET TYPE

Appliance Store Firms/Stores

The fifty largest firms operating household appliance stores account for one-fifth of the total sales volume of $5.7 billion (all types of merchandise) generated by these outlets. These same fifty firms operate only 3.9% of the stores, illustrating how the major owners dominate the marketplace.

Concentration by Largest Firms of Household Appliance Stores, 1982
(Sales in millions of dollars)

	Number	%	Sales	%
Household appliance stores, total	10,542	100.0%	$5,697.3	100.0%
4 largest firms	147	1.4	435.4	7.6
8 largest firms	181	1.7	556.4	9.8
20 largest firms	294	2.8	792.7	13.9
50 largest firms	412	3.9	1,133.9	20.0

A more detailed look at home appliance store sales is covered in the 1982 census of retail trade. This data shows the extent to which the major stores, though a relatively small segment in number, account for a large share of appliance sales.

Household Appliance Stores, 1982
(Sales in millions of dollars)

	Firms		Stores		Sales	
	Number	%	Number	%	Number	%
Household appliance stores, total*	9,226	100.0%	10,542	100.0%	$5,593.0	100.0%
Single unit	8,253	89.5	8,253	78.3	3,414.8	61.1
Multi unit	973	10.5	2,289	21.7	2,178.2	38.9
Under 10 stores	955	10.4	1,928	18.3	1,597.9	28.6
10 or more stores	18	0.2	361	3.4	580.3	10.4
Firms in operation entire year	8,809	100.0	10,122	100.0	5,486.5	100.0
With annual sales of:						
$10 million or more	37	0.4	370	3.7	1,007.2	18.4
$5 million - $9.9 million	52	0.6	191	1.9	341.9	6.2
$2.5 million - $4.9 million	211	2.4	406	4.0	708.5	12.9
$1 million - $2.49 million	859	9.8	1,128	11.1	1,281.9	23.4
Under $1 million	7,650	86.8	8,027	79.3	2,146.8	39.1
Stores in operation entire year			10,094	100.0	5,440.7	100.0
$2.5 million - $10 million			306	3.0	1,359.2	25.0
$1.0 million $2.49 million			1,048	10.4	1,565.1	28.8
$500,000 - $999,999			1,729	17.1	1,206.0	22.2
$250,000 - $499,999			2,131	21.1	763.3	14.0
Under $250,000			4,880	48.3	547.1	10.1

* Firms in business at end of year.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade,
Establishment and Firm Size, RC82-I-1.

RETAIL SALES BY OUTLET TYPE

Appliance Store Firms/Stores

Sales of home appliance stores for the first six months of 1985 totaled $3.9 billion, an increase of 10.5% over the same period in 1984, according to the Bureau of the Census.

Total Sales of Household Appliance Stores, 1983-1984

	1984	1983	% Change 1984/1983
Total sales (mil. $)	$7,899	$6,876	+ 14.9%

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales.

Monthly Sales Pattern in Household Appliance Store Sales, 1983, 1984

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1984	7.0%	6.7%	7.2%	7.0%	7.5%	9.1%	8.9%	8.8%	8.5%	8.4%	9.3%	11.6%	100.0%
1983	6.6	6.3	7.2	7.3	7.5	8.5	9.6	9.0	8.5	8.3	9.4	11.8	100.0

Source: Based on U.S. Bureau of the Census,
Revised Monthly Retail Sales, BR-13-85.

Department Store Sales of Major Appliances/Electric Housewares

In recent years there has been a tendency for department stores to eliminate major household appliance departments in their stores. According to the 1977 census of retail trade, 5,861 of the total count of 8,807 department stores (66.5%) sold major appliances. In 1982, 6,286 department stores out of a total of 9,981 in the U.S. (63%) sold major appliances.

In the department stores handling major appliances, these accounted for 5.2% of sales in 1983, 5.3% in 1977. Of total department store sales, including stores not handling major appliances, this merchandise represented 3.6% of 1982 sales vs. 4.1% in 1977.

The contribution of small electric appliance sales to department store business has grown since 1977. In that year this merchandise represented 1.7% of the sales of department stores carrying the line (92% of the stores). In 1982 electric housewares represented 2.4% of the sales of department stores carrying the line (89% of the department stores). Of all department store sales, electric housewares accounted for 2.1% in 1982 vs. 1.6% in 1977.

Department Store Sales of Major Appliances/Electric Housewares

Major Appliance & Small Electric Appliance Sales in Department Stores, 1982

	Established Selling Merchandise Line	Sales of Specified Merchandise Line: Total (thous.) $	Percent of Total Sales of: Stores Selling Line	Percent of Total Sales of: All Department Stores
Major household appliances	6,286	$3,585,980	5.2%	3.6%
Kitchen appliances	3,149	1,731,468	3.8	1.7
Laundry appliances	2,145	798,540	2.1	0.8
Other major appliances	5,482	1,055,972	1.7	1.1
Small electric appliances	8,891	2,115,475	2.4	2.1

Source: U.S. Bureau of the Census
1982 Census of Retail Trade, RC82-1-3.

Department Store Operations

Typical (median) operating results for major appliance and electric housewares departments in department stores with a total volume of over $1 million are reported annually by the National Retail Merchants Association, Controllers' Congress. Results for the latest available year (1983) are reported in the following table.

Merchandising & Operating Results of Major Appliance & Small Electrical Appliance Departments in Department Stores, 1983

(Median results in stores with total sales over $1 million)

	Total Upstairs Store (100*)	Major Appliances (43*)	Vacuums & Floor Polishers (13*)	Small Electrical Appliances (70*)
Net sales, % change from last year	+ 8.8%	+ 6.9%	+14.4%	+12.0%
Sales, % of merchandise division**	--	26.6	7.6	31.1
Sales, % of total store sales	91.7	0.9	0.3	1.2
$ sales per square foot of selling space (main or largest selling unit)	$109.9	$215.1	$283.8	$134.5
Cumulative markon, %	48.6%	27.0%	30.6%	28.1%
Gross margin, % of sales (including cash discounts)	41.9	22.0	25.3	21.8
Markdowns, % of sales (including employee discounts)	14.9	5.9	9.2	8.0
Number of stock turns	2.7	3.5	3.2	2.5

* Number in parenthesis refers to the number of reporting firms in each category.

** The merchandise division for all three departments is appliances and utility equipment.

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1983.

Estimated Retail Sales of Major Appliances In 25 Leading Metropolitan Areas, 1982 and 1983

		1983 (Mil. $)		1982 (Mil. $)	
1983 Rank	Metropolitan Area	Total	% of U.S. Total	Total	% of U.S. Total
1	Los Angeles-Long Beach	$497.9	3.3%	$446.2	3.2%
2	Boston-Lawrence-Salem-Lowell	386.7	2.5	339.2	2.4
3	Chicago	357.1	2.3	335.7	2.4
4	New York	301.5	2.0	273.0	1.9
5	Houston	261.3	1.7	247.3	1.8
6	Philadelphia	260.7	1.7	244.3	1.7
7	Detroit	254.8	1.7	253.6	1.8
8	Washington, D.C.	198.9	1.3	179.0	1.3
9	Dallas	196.7	1.3	172.5	1.2
10	Anaheim-Santa Ana	173.9	1.1	149.7	1.1
11	Nassau-Suffolk	166.1	1.1	147.4	1.1
12	San Diego	146.2	1.0	127.5	0.9
13	Minneapolis-St. Paul	133.0	0.9	130.8	0.9
14	Atlanta	132.2	0.9	124.0	0.9
15	Pittsburgh	125.8	0.8	122.5	0.9
16	Seattle	125.1	0.8	116.4	0.8
17	Miami-Hialeah	123.8	0.8	117.8	0.8
18	Tampa-St. Petersburg	122.0	0.8	107.8	0.8
19	Baltimore	117.8	0.8	112.5	0.8
20	Denver	117.4	0.8	108.9	0.8
21	St. Louis	114.0	0.7	109.4	0.8
22	San Jose	106.2	0.7	90.7	0.6
23	Portland	105.0	0.7	98.9	0.7
24	Riverside-San Bernardino	104.7	0.7	93.3	0.7
25	San Francisco	103.9	0.7	86.1	0.6
	25 Metropolitan areas, total	$4,732.7	31.1	$4,334.5	30.9
	U.S. total	15,210.3	100.0	14,019.3	100.0

Source: Based on Sales & Marketing Management "Survey of Buying Power", 1982, 1984.
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MICROWAVE OVEN SALES

The Association of Home Appliance Manufacturers projects that microwave ovens will attain a 50% household penetration by 1986. Industry sources place that figure as high as 65%-70%, as eastern and midwestern parts of the nation rise to the level of microwave penetration already present in the West.

Many of these sales will be coming from the housewares departments of mass merchants, catalog showrooms, and department stores. As ovens become smaller and retail prices lower, manufacturers are turning increasingly toward houseware departments to expand their distribution. Housewares buyers, who had previously left the sale of microwave ovens to traditional appliance retailers and major appliance departments, are now calling microwaves a "basic" for their departments. Manufacturers hope to take advantage of the large and broad audiences attracted to many housewares departments, as well as the prominent displaying of their models on the selling floor. Housewares retailers, impressed with the improved styling of microwaves, are hoping for even more dramatic product design to draw customers. Retailers, in addition, are pushing microwave prices down; the most talked about model today is the $99 microwave.

Percent of Year's Microwave Oven Sales by Month, 1984

	% of Sales
January	10.9%
February	5.7
March	4.9
April	5.5
May	7.4
June	4.8
July	7.4
August	5.4
September	4.6
October	8.2
November	10.3
December	24.9
Average per month	8.3%

Source: Newspaper Advertising Bureau,
1985 Newspaper Advertising Planbook.

CONSUMER PRICES

Consumer prices for all household appliances stayed virtually the same during 1984 as they were in 1983 (+ 0.3%). The price level for laundry equipment, as in the past, rose at a faster rate.

Consumer Price Indexes for Specified Major Appliances, 1983, 1984 & June, 1984, 1985

	June Monthly Averages			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All items	322.3	310.7	+ 3.7%	311.1	298.4	+ 4.3%
Household appliances	184.2	189.7	- 2.9	188.9	188.4	+ 0.3
Refrigerators & home freezers	193.8	196.8	- 1.5	196.4	193.3	+ 1.6
Laundry equipment (12/77=100)	147.1	145.0	+ 1.4	146.6	143.0	+ 2.5
Other household appliances (12/77=100)	120.1	125.4	- 4.2	124.5	125.2	- 0.6
Stoves, dishwashers, vacuums & sewing machines (12/77=100)	120.3	127.0	- 5.3	124.6	124.3	+ 0.2
Office machines, small electric appliances & air conditioners (12/77=100)	120.2	124.4	- 3.4	124.3	126.4	- 1.7

RETAIL ADVERTISING

Percent of Year's Total Newspaper Ad Linage Done By Retailers Each Month, 1984

	Clothes Dryers	Clothes Washers	Refrigerators	Room Air Conditioners	Small Electric Appliances
January	9.9%	9.5%	7.8%	3.8%	3.2%
February	7.3	7.9	7.0	4.0	5.6
March	9.4	7.9	6.2	5.3	6.7
April	6.9	7.2	6.9	6.6	6.0
May	8.3	7.7	9.2	15.8	12.4
June	8.1	9.1	9.7	25.0	5.1
July	10.0	10.1	12.4	25.8	3.7
August	7.4	7.1	10.9	9.0	4.8
September	8.5	8.7	9.3	2.8	7.4
October	7.4	8.3	6.3	0.7	6.9
November	9.5	9.1	6.4	0.4	17.0
December	7.3	7.5	7.9	0.8	21.2

Source: Advertising Checking Bureau, 1984, Neustadt Reports Division based on newspaper advertising in Chicago, Philadelphia, Cincinnati, Cleveland, Dallas, Los Angeles, and Washington, D.C.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Consumer Track is a new semi-annual survey of consumer purchases and purchase intentions conducted for HFD--Retailing Home Furnishings. Its objective is the tracking of changes in the housewares market over time.

Thus far, two of these surveys have been done--one in the Summer of 1984 and one in the Winter of 1985. The data presented in Consumer Track is based on a nationally represented sample of 10,000 households. Respondents were sent mail questionnaires by NFO Research, Inc. (National Family Opinion). The NFO panel consists of households selected to conform to the latest Census data in regard to market size, household income, and other demographic considerations.

Intention to Buy Versus Actual Purchases

In eight out of the ten product categories reported, respondents purchased more housewares than they said they would six months earlier. Microwave cookware was most popular with the surveyed households, with 6.6% indicating their intent to purchase it and 10.5% actually following through. Only the purchases of irons and electric mixers did not exceed the expected purchase rates of respondents.

Intended Versus Actual Housewares Purchases
(Percent of surveyed households)

	Intent to Purchase (Summer 1984)	Actual Purchase (Winter 1985)
Microwave cookware	6.6%	10.5%
Coffee maker	5.6	8.4
Iron	5.6	5.2
Toaster	3.4	3.5
Electric can opener	3.4	4.2
Hair dryer	3.1	5.9
Full-sized vacuum	2.8	3.8
Toaster-oven	2.2	2.4
Electric mixer	2.2	2.2
Food processor	1.8	2.2

Source: HFD - July 8, 1985.

Seasonal Purchase Patterns

The seasonal nature of the retail market and, in particular, the higher sales reported in the second half of the year, is evident in the housewares business. All ten product categories had higher sales levels in the Winter, 1985 than in the Summer 1984. Microwave cookware and coffee makers were, respectively, the two products purchased most by survey respondents in both time periods.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Seasonal Purchase Patterns

Consumer Housewares Purchases, Summer 1984 and Winter 1985
(Percent of households making purchase)

	Summer 1984	Winter 1985
Microwave cookware	6.7%	10.5%
Coffeemaker	5.9	8.4
Iron	4.6	5.2
Hair dryer	3.9	5.9
Full-sized vacuum	3.3	3.8
Electric can opener	2.5	4.2
Toaster	2.8	3.5
Toaster-oven	1.6	2.4
Electric mixer	1.5	2.2
Food processor	1.0	2.2

Source: HFD - July 8, 1985.

Purchases by Store Type

Discount chains were, by a wide margin, the preferred outlet for housewares purchases by respondents. With the exception of vacuums, all product categories had the most sales in discount stores, often accounting for more sales than the other store types combined. Vacuums had the majority of its sales in national chains (such as Sears).

Distribution of Housewares Purchases by Store Type, Summer 1984
(Percents of units purchased)

	Microwave Cookware	Coffee Maker	Iron	Toaster	Electric Mixer	Toaster Oven	Food Processor
Department store	13.5%	14.4%	17.9%	9.0%	18.6%	13.6%	16.9%
Appliance Store	4.2	1.8	2.3	2.6	2.3	3.4	3.4
Discount chain	52.9	48.9	44.3	54.5	39.5	50.0	23.7
National chain*	11.5	7.5	7.3	10.9	9.3	3.4	13.6
Hardware store	2.3	3.9	3.8	7.7	2.3	3.4	3.4
Catalog showroom	3.9	14.4	13.0	9.0	10.5	19.3	18.6
Other store types	11.7	9.0	11.5	6.4	17.4	6.8	20.3

	Electric Can Opener	Full-sized Vacuum	Hair Dryer
Department store	15.0%	17.2%	8.3%
Appliance Store	1.4	9.1	0.5
Discount chain	45.7	14.0	49.5
National chain*	7.1	28.5	12.5
Hardware store	4.3	4.8	0.9
Catalog showroom	13.6	5.9	8.8
Other store types	12.9	20.4	19.4

* Sears, Ward, Penney, K mart.

Source: HFD-January 14, 1985.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Replacement or First-time Purchases

Eight of the ten product categories had a higher incidence of purchase as replacement items rather than as new items, according to the survey. Reflecting the relative newness of the products, only microwave cookware and food processors are still being purchased more as new items.

Housewares Purchases: Replacement Versus First-time Purchases, Winter 1985
(Percent of respondents making purchase)

	Replacement Purchase	First-time Purchase
Iron	83.2%	8.1%
Toaster	81.9	11.7
Full-sized vacuum	79.3	17.8
Hair dryer	79.2	13.0
Electric can opener	76.1	15.4
Coffee maker	70.2	24.3
Electric mixer	69.4	25.8
Toaster oven	56.1	37.9
Food processor	20.3	75.4
Microwave cookware	9.7	82.5

Source: HFD-May 13, 1985.

Purchase Price for Housewares

The average price that households paid for housewares in the Winter 1985 were less than those paid in the Summer 1984 in seven of the ten categories reported here. The biggest drop was in the purchase of food processors, a 16.8% decline to $77.54. The biggest rise was in the price of electric mixers, a gain of more than 18% to $53.64.

Prices Paid for Housewares, Summer 1984 and Winter 1985

	Average price paid (Summer 1984)	Average price paid (Winter 1985)
Full-sized vacuum	$198.93	$192.60
Food processor	93.15	77.54
Toaster-oven	47.57	46.27
Electric mixer	45.26	53.64
Coffee maker	28.72	29.52
Microwave cookware	25.14	23.78
Iron	20.71	23.15
Toaster	20.17	18.98
Electric can opener	16.68	15.93
Hair dryer	13.68	14.07

Source: HFD-July 8, 1985.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Purchases by Region

Demand for housewares products in eight of the ten product categories was strongest in the Southern states. Sales of electric can openers, irons and microwave cookware were particularly high in that region. The two exceptions to the dominance of this area lie in the purchases of toasters by respondents living in the North Central region and in the purchase of food processors by Northeastern households.

Distribution of Housewares Purchases by Region, Summer 1984
(Percent of purchasers living in each region)

	Microwave Cookware	Coffee maker	Iron	Toaster	Electric Mixer	Toaster Oven	Food Processor
Northeast	19.8%	22.4%	26.0%	23.8%	19.1%	30.0%	30.0%
North Central	29.0	30.0	24.9	31.3	28.1	17.8	18.3
South	35.2	32.9	36.1	28.1	31.5	31.1	28.3
West	15.9	14.7	13.0	16.9	21.3	21.1	23.3

	Electric Can opener	Full-sized Vacuum	Hair Dryer
Northeast	25.7%	20.9%	23.7%
North Central	16.0	25.1	23.7
South	44.4	33.5	33.5
West	13.9	20.4	19.2

Source: HFD-January 14, 1985.

Household Income of Purchasers

Households with annual incomes of $40,000 or more represented 23% of housewares purchasers according to the survey. The percentage of households in this income bracket is highest among those that purchased food processors, with the average income of those purchasing that product at $31,970.

Average Annual Household Income of Housewares Purchasers-Winter 1985

	Average Annual Household Income
Food processor	$31,970
Iron	29,350
Hair dryer	27,890
Toaster-oven	27,680
Coffee maker	27,400
Electric can opener	26,960
Electric mixer	26,600
Full-sized vacuum	26,240
Microwave cookware	26,080
Toaster	25,520

Source: HFD-September 9, 1985.

Appliance Purchases by Store Type

Catalog stores (such as Sears) and appliance/T.V. stores are the two principal retail outlets for the purchase of major appliances in 1985. The 13th Annual Consumer Survey conducted for Merchandising magazine by Home Testing Institute reports on what stores consumers would be most likely to buy in. One of the above store types or the other was the predominant outlet for the ten major appliance categories reported here with one exception. Catalog stores were the most popular choice for the purchase of microwave ovens, dishwashers, trash compactors, washers, dryers, and freezers while appliance/T.V. stores led in the purchase of ranges, air conditioners, and freezers. The one exception was the case of disposer purchases, with builders/remodelers leading as the primary choice.

Distribution of Appliance Purchases by Store Type, 1985

	Microwave Oven	Range	Dishwasher	Trash Compactor	Disposer
Appliance/T.V. store	26.6%	26.9%	26.0%	21.4%	10.2%
Builder/Remodeler	2.1	16.2	18.5	9.5	30.8
Catalog store (Sears, etc.)	28.1	21.1	28.3	38.1	19.4
Department store	6.9	4.6	2.6	4.8	1.0
Discount store	6.1	2.6	3.6	2.4	6.7
Microwave specialty store	6.1	--	--	--	--
Received as gift	10.4	2.3	2.6	2.4	1.6
Other	13.7	26.3	18.4	21.4	30.3

	Washer	Dryer	Air Conditioner	Refrigerator	Freezer
Appliance/T.V. store	31.9%	30.8%	27.8%	33.4%	28.3%
Builder/Remodeler	2.2	2.4	4.9	6.1	--
Catalog store (Sears, etc.)	39.8	39.2	27.5	28.9	39.1
Department store	7.5	8.1	4.7	6.9	5.0
Discount store	2.9	2.8	4.4	3.4	5.5
Microwave specialty store	--	--	--	--	--
Received as gift	2.9	2.8	5.7	3.2	3.8
Other	12.8	13.9	25.0	18.1	18.3

Source: Merchandising magazine
13th Annual Consumer Survey,
September 1985.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

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INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

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THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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TABLE OF CONTENTS

Page

MARKET TRENDS.. 1

AT THE MANUFACTURER LEVEL:
  GENERAL INDUSTRY STATISTICS.. 2
    EMPLOYMENT & EARNINGS.. 4
    CONCENTRATION IN THE INDUSTRY.................................... 5
  PRODUCTION... 9
    BY FABRIC..10
    MATERIALS CONSUMED IN PRODUCTION.................................12
    SEASONAL PATTERNS IN PRODUCTION..................................13
  PRODUCT SHIPMENTS..14
  PRODUCER PRICES..18
  FOREIGN TRADE..19
    IMPORTS..20
    EXPORTS..21

AT THE RETAIL LEVEL:
  THE POTENTIAL MARKET...23
  RETAIL SALES...26
    BY PRODUCT...27
    BY STORE TYPE..29
  RETAIL ADVERTISING...32
  CONSUMER PRICE INDEX...33
  CONSUMER BUYING HABITS...33

SCHEDULE OF ADDITIONAL FACT FILES....................................35

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MEN'S TAILORED CLOTHING SEPARATES & RAINWEAR

Market Trends

The several consecutive years of decline at the manufacturing level in the men's tailored clothing industry experienced a brief respite in 1984 with employment, production, and domestic shipments all registering increases for the year. However, as 1985 progresses, the industry is returning to its long term trend of decline. Over the first five months of 1985, employment and unit production have recorded declines.

The major problem facing manufacturers in the men's tailored wear industry, as with almost all areas of the apparel industry, are imports from low-cost, developing countries. According to the International Trade Administration (U.S. Department of Commerce), the percentage of imports to new supply in the men's & boys' suit and coat industry skyrocketed from 17.2% in 1982 to 22.3% in 1984, on a current dollar basis. In 1984 alone, the Census Bureau reported that the value of imports in the men's tailored wear industry jumped 35.1%, while on a unit basis, the increase was 26.0%. The major reasons for the continued growth of imports in this segment of the apparel industry are the high-labor intensiveness, and thus the significant cost differences in developing countries and the continued strength of the U.S. dollar.

At the retail level, sales of men's tailored wear increased in every measured category in 1984 according to estimates from Kurt Salmon Associates, a New York based consulting firm. This company estimates that sales in all categories, except rainwear, will increase in 1985, with rainwear remaining even. However, industry analysts say that not all segments of the industry are sharing equally in the gain. Better-priced merchandise is reported to be selling at much better rates than either moderate or popular-priced goods.

Another recent trend on the retail side of the men's tailored wear industry is an attempt by some department stores to reassert themselves in the suit market. After several years of relegating the tailored wear market to discounters, mass merchants and specialty stores, some department stores are now reentering the tailored clothing market although on a smaller scale with a limited number of brands and designers. They are also developing their own private label programs. At the upper-priced end of the tailored wear industry, department stores remain the dominating outlet and show no signs of relinquishing this business.

The trend of wearing sports coats and slacks in situations where suits had been the norm is continuing. As a result, the recessionary period of the early 1980's has had a dramatic effect on the industry. More consumers in 1985 are purchasing sports coats and slacks as an alternative to a tailored suit than ever before due to lower expenses and a greatly increased public acceptance.

Rainwear sales remain heavily dependent on weather conditions throughout the country, so the industry fluctuates greatly. In recent years, many manufacturers, particularly brand name ones, have attempted to stimulate sales through heavy promotions. While many manufacturers feel that these types of programs are disruptive to the industry, others feel that in light of the volatility of the industry, a high degree of promotion is required to keep sales up and inventories in line.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

An overview of trends in the tailored clothing industry--based on the main segments which include coats, suits and separate trouser producers--is published by the International Trade Administration.

Trends in Components of the Men's & Boys' Tailored Clothing Industry
(Compound Annual Rate of Growth)

	Suits & Coats		Separate Trousers	
Industry Data	1972-82	1977-82	1972-82	1977-82
Value of shipments (current $)	2.5%	2.0%	2.3%	4.9%
Value of shipments (1972 $)	-3.3	-3.7	-3.7	-0.8
Total employment	-4.9	-5.3	-4.7	-4.4
Production workers	-4.9	-5.4	-5.0	-4.5
Average hourly earnings	6.1	6.0	7.8	7.2
Capital expenditures	0.9	-0.9	5.0	9.6
Trade Data				
Value of imports	16.2	12.5	nr	nr
Import/new supply ratio	10.9	9.5	nr	nr
Value of exports	20.3	43.6	7.6	23.5
Export/shipment ratio	16.6	42.5	5.8	18.3

nr not reported.

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

The ITA estimated industry shipments (which includes all products--both primary and secondary--made within an industry classification plus miscellaneous receipts) in 1984 at $3.2 billion in the men's and boys' suit and coat industry and $2.5 billion in the separate trouser industry.

Estimated Value of Industry Shipments In Men's & Boys' Tailored Wear, 1983, 1984
(In millions of dollars)

	Current Dollars		Constant (1972) Dollars		% Change 1984/83	
	1984	1983	1984	1983	Current Dollars	Constant Dollars
Suits & coats (SIC 2311*)	$3,232	$3,040	$1,725	$1,657	+ 6.3%	+ 4.1%
Separate trousers (SIC 2327)	2,505	2,236	1,375	1,231	+12.0	+11.7

* See footnotes following the next table.

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census conducts a complete census of U.S. manufacturers every five years, in those years ending in "2" and "7". Selected results of the 1982 census, released in early 1985, are summarized below.

In all three groups, which make up the men's & boys' tailored wear industry, the number of companies in the industry decline by about one-third between 1977 and 1982. As most operations in this industry are small, with only one or two plants, the number of establishments dropped by a similar percentage during this period.

Men's & Boys' Suits & Coats (SIC 2311*)

	1982	1977	% Change 1982/1977
Number of companies	443	619	- 28.4%
Number of establishments**	528	737	- 28.4
Payroll (mil. $)	$ 876.7	$ 822.2	+ 6.6
Value added by manufacture# (mil. $)	$1,681.2	$1,574.4	+ 6.8
Value of shipments ## (mil. $)	$3,059.7	$2,767.5	+ 10.6
Capital expenditures, new (mil. $)	$ 24.6	$ 25.8	- 4.7

Men's & Boys' Separate Trousers (SIC 2327*)

	1982	1977	% Change 1982/1977
Number of companies	269	404	- 33.4%
Number of establishments**	356	514	- 30.7
Payroll (mil. $)	$ 564.9	$ 474.0	+ 19.2
Value added by manufacture# (mil. $)	$1,111.2	$ 845.6	+ 31.4
Value of shipments ## (mil. $)	$2,165.4	$1,718.0	+ 26.0
Capital expenditures, new (mil. $)	$ 35.7	$ 22.8	+ 56.6

Waterproof Outer Garments (SIC 2385*)

	1982	1977	% Change 1982/1977
Number of companies	98	155	- 36.8%
Number of establishments**	112	167	- 32.9
Payroll (mil. $)	$ 101.1	$ 89.4	+ 13.1
Value added by manufacture# (mil. $)	$ 246.0	$ 194.4	+ 26.5
Value of shipments ## (mil. $)	$ 449.2	$ 348.8	+ 28.8
Capital expenditures, new (mil. $)	$ 0.9	$ 1.6	- 43.8

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC) determined by the principal product made, as shown on the following page.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2311 comprises establishments primarily engaged in manufacturing men's, youth's, and boys' suits, coats and overcoats, as well as tailored dress and sportcoats. Establishments primarily engaged in manufacturing uniforms (military, policemen's, firemen's, etc.) are also included. Those manufacturers engaged primarily in making work and sport garments are not included.

SIC 2327 comprises establishments primarily engaged in manufacturing men's youth's and boys' separate slacks and trousers.

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer garments made from such material as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children.

** Each business location is counted as a separate establishment.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes, the best value of measure of individual industries.

Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). The total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982.

Employment & Earnings

While employment in the men's and boys' suit segment has been on the rise between 1982 and 1984, employment in the separate trousers segment of the industry, which has been declining since 1977, registered an increase in 1984. According to data from the Bureau of Labor Statistics, 72,100 persons were employed in the men's & boys' suit & coat segment in 1984 while 65,600 worked in the men's separate trousers area.

As 1985 progresses, however, it appears that the trend toward declining employment in both groups is continuing. Between August 1984, and August 1985, the number of employees in the men's & boys' coat and suit industry fell 5.0%, while the number in the separate trousers group was off 2.5% during the same period.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

The decline in employment which the men's tailored wear industry has experienced and continues to experience bodes poorly for domestic manufacturers. As with most other areas of the apparel industry, tailored wear is highly labor intensive. As manufacturing moves to lower cost developing countries with the resultant rise in imports, the domestic industry continues to spiral downward. Thus, the decline in employment registered in the first few months of 1985 is a probable harbinger of further decline for the industry throughout 1985.

Employment & Earnings of Selected Men's & Boys' Tailored Wear Industries

	August Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Men's & boys' suits & coats:						
All employees (thous.)	68.2	71.8	- 5.0%	72.1	70.4	+ 2.4%
Production workers (thous.)	59.6	63.0	- 5.4	63.2	61.5	+ 2.8
Average weekly earnings	$224.40	$241.19	- 7.0	$238.1	$221.7	+ 7.3
Average weekly hours	34.0	36.6	- 7.1	36.5	35.7	+ 2.2
Average overtime hours	0.6	1.3	-53.8	1.1	0.7	+57.1
Men's & boys' separate trousers:						
All employees (thous.)	65.1	66.8	- 2.5	65.6	62.7	+ 4.6%
Production workers (thous.)	57.3	58.4	- 1.9	57.1	54.4	+ 5.0
Average weekly earnings	$193.04	$188.86	+ 2.2	$191.8	$184.7	+ 3.8
Average weekly hours	36.7	36.6	- 0.3	37.0	36.8	+ 0.5
Average overtime hours	1.4	1.1	+27.3	1.2	1.3	- 7.7

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Concentration in the Industry

As was previously mentioned, the vast majority of companies in the men's tailored clothing industry are small operations with few plants or employees. According to the 1982 census of manufactures, one out of four suit and coat plants had fewer than 10 employees while in the separate trousers and waterproof outergarment segments, one in five fits this category. In the waterproof outergarment only two different categories, suit and coat groups, better than half of all plants employ less than 50 workers. In the separate trousers area, the total was about 45%. Still to be released by the Census Bureau are reports on a firm (as opposed to establishment) basis.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Despite their small number, large plants (with more than 250 employees) account for a major share of industry shipments. In 1982, only 18% of all plants fit into this category, yet the Census Bureau reports these plants accounted for about 60% of shipments. Likewise, in the separate trousers category, 21.6% of the plants employed 250 or more workers yet these same plants represent 60% of industry shipments.

The Men's Tailored Wear Industry by Employment Size, 1982

	Establishments		Employees		Shipments	
	Number	Percent	Thous.	Percent	Mil. $	Percent
Men's & boys' suits & coats, total	528	100.0%	75.0	100.0%	$3,059.7	100.0%
By establishment size:						
Under 10 employees	128	24.2	0.5	0.7	66.4	2.2
10 - 49 employees	138	26.1	3.4	4.5	359.4	11.7
50 - 249 employees	168	31.8	21.3	28.4	866.9	28.3
250 or more employees	94	17.8	49.8	66.4	1,767.1	57.8
Separate trousers, total	356	100.0	56.9	100.0	2,165.4	100.0
By establishment size:						
Under 10 employees	68	19.1	0.3	0.5	31.5	1.5
10 - 49 employees	62	17.4	1.6	2.8	190.7	8.8
50 - 249 employees	149	41.9	21.0	36.9	639.6	29.5
250 or more employees	77	21.6	34.0	59.8	1,303.6	60.2
Waterproof outergarments, total	112	100.0	9.3	100.0	449.2	100.0
By establishment size:						
Under 10 employees	20	17.9	(D)	--	(D)	--
10 - 49 employees	50	44.6	1.3	14.0	75.4	16.8
50 - 249 employees	30	26.8	3.1	33.3	167.2	37.2
250 or more employees	12	10.7	(D)	--	(D)	--

(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982.

According to estimates in Sales & Marketing Management magazine's Survey of Buying Power, 1984, plants with 100 or more employees in 1984 accounted for 89% of industry shipments in the suit and coat industry that year. In the separate trousers area, plants of the same size represented 93% of industry shipments while in the waterproof outergarment area they were responsible for 73% of shipments.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Employment & Share of Shipments in Large Plants in the Men's Tailored Apparel Industry, 1984

	Number of Plants		% of Industry Shipments Accounted For By Plants With 100 or More Employees
	With 20+ Employees	With 100+ Employees	
Men's & boys' suits & coats (SIC 2311*)	428	232	89%
Men's & boys' separate trousers (SIC 2327*)	362	264	93
Waterproof outer garments (SIC 2385*)	105	37	73

* For a definition of SIC codes, see page 3.

Source: Sales and Marketing Management,
"Survey of Industrial Power",
April, 1985.
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By Region

New York remained the leader in the number of manufacturing facilities in 1982 in all three segments of the men's tailored wear industry. However, between 1977 and 1982, the only area in which New York increased its share of the total number of plants was in men's and boys' suits and coats. In this group, New York's share of plants climbed from 23.6% in 1977 to 25.3% in 1982 compared with declines from 20.0% to 16.0% in separate trousers and 37.1% to 21.4% in waterproof outergarments during this same period.

When the percentage of industry shipments accounted for by each state is examined, New York is the leader in only one category: waterproof outergarments. In the suits category, Pennsylvania was the leading state in industry shipments, representing 22% of the total while in the separate trousers industry, Texas was the leading state for shipments, carrying 23% of the total.

GENERAL INDUSTRY STATISTICS

By Region

Leading Manufacturing States in The Men's Tailored Clothing Industry, 1982

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Men's & boys' suits & coats (SIC 2311*)				
U.S. total	528	343	$1,681.2	$3,059.7
Leading states:				
New York	134	57	211.5	375.7
Pennsylvania	95	72	380.3	672.1
California	40	23	53.0	82.2
Massachusetts	36	25	189.0	363.6
New Jersey	29	19	57.5	83.0
Georgia	25	22	121.6	259.9
Maryland	22	15	83.6	190.2
Leading states total	381	233	1,096.5	2,026.7
Percent of U.S. total	72.1%	67.9%	65.2%	66.2%
Men's & boys' separate trousers (SIC 2327*)				
U.S. total	356	268	$1,111.2	$2,165.4
Leading states:				
New York	57	25	69.5	197.2
Georgia	47	44	174.7	322.2
Pennsylvania	34	25	60.1	89.4
California	31	8	12.1	23.1
Texas	24	22	201.9	498.6
Alabama	23	22	(D)	(D)
Leading states total	216	146	na	na
Percent of U.S. total	60.6%	54.5%	--	--
Waterproof outergarments (SIC 2385*)				
U.S. total	112	76	$ 246.0	$ 449.2
Leading states:				
New York	24	16	23.3	62.9
Massachusetts	12	9	22.4	32.7
Maryland	11	10	(D)	(D)
New Jersey	9	6	11.9	23.4
Georgia	6	5	7.9	14.6
Florida	5	5	5.4	10.5
Leading states total	67	51	na	na
Percent of U.S. total	59.8%	67.1	--	--

* For definitions of SIC codes see page 4.
(D) Withheld to avoid disclosure.
na not available

Source: U.S. Bureau of the Census, *Census of Manufactures, 1982*, MC82-I-23A; MC82-I- 23D.

PRODUCTION

Unit production in the men's and boys' tailored wear industry, which had been on the decline for several years, registered a brief upturn in 1984, according to information from the U.S. Census Bureau. Overall, total unit production increased 8.4% in 1984, rising to 158.7 million units in that year. However, monthly data from the Census Bureau indicates that in 1985 the decline in production in the industry has resumed. None of the four major categories registered an increase in production during the first five months of 1985 versus 1984 with the largest decline for men's suits, off by 20.2%.

During the full year 1984, two overall categories registered declines in production. Overcoats, topcoats, and tailored suburban/car coats recorded a decline of 10.2%, falling to 1.8 million units; the separate vests group marked a decline to 1.3 million units, down 5.2% for the year.

Data from the Current Industrial Reports on production of men's and boys' tailored clothing is summarized below, as compiled by the Census Bureau through surveys among manufacturers, government contractors, and jobbers. Not included are very small producers (generally less than five employees). These are, however, included in the complete 1982 census of manufactures.

The current data covered in the CIR series also includes garments which were cut in the U.S. and sent outside the country and then reimported as finished garments, under provisions of Item 807.00 on the tariff schedule.

Production of Men's Tailored Clothing & Rainwear, 1983, 1984
(Thousands of units)

	1984	1983	% Change 1984/1983
Tailored clothing	158,706	146,468	+ 8.4%
Tailored suits, incl. uniforms	11,994	10,873	+ 10.3
Trios	161	231	- 30.3
Uniform suits	152	177	- 14.1
Overcoats, topcoats & tailored suburban & car coats, incl. uniform	1,768	1,968	- 10.2
Uniform coats	238	239	- 0.4
Tailored suit-type dress & sportcoats, incl. uniform	20,656	19,216	+ 7.5
Uniform coats & jackets	1,233	1,340	- 8.0
Separate vests, exc. sweater vests	1,323	1,395	- 5.2
Separate dress & sport trousers, incl. uniform	122,965	113,016	+ 8.8
Uniform	5,394	5,608	- 3.8
Men's & boys' raincoats, incl. uniform	3,173	2,896	+ 9.6

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1
(July 1985).

PRODUCTION

Explanation of Terms:

Tailored uniform suits:

Includes military, guards, band, police, fire, etc. Nontailored worktype suits, such as delivery drivers and gas station attendants are included in other categories.

Trios:

Includes tailored suits with a matching and contrasting pair of pants.

Overcoats, topcoats & tailored suburban, car & stormcoats:

Includes only tailored items including uniform, reversible, zipper-lined, fingertip, and wool water-repellent coats, excludes raincoats.

Raincoats:

Includes waterproof outercoats and water-repellent coats of cotton and man-made fibers including uniforms.

Separate vests including uniform:

Includes vests not part of suits, excludes sweater vests.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1
(July 1985).

By Fabric

Man-made and chiefly man-made fiber fabrics remain the primary type in every measured category of men's tailored wear and rainwear in 1984 according to the results of the 1984 CIR on men's & boys' apparel production.

In three of the six measured categories, however, natural fiber fabrics were the fastest growing group between 1983 and 1984. In the suits, sportcoats, and separate vests categories, cotton or wool fabrics were seen growing the fastest. Man-made fibers had the highest growth rates in the overcoats, raincoats and separate trousers groups.

Production of Reported Categories of Men's Tailored Wear
By Fabric, 1983, 1984
(Thousands of units)

	1984	1983	% Change 1984/1983
Tailored suits, including uniform	11,994	10,873	+ 10.3%
By fabric:			
All cotton & chiefly cotton	331	148	+123.6
Man-made/wool blends, chiefly man-made	4,453	3,960	+ 12.4
All man-made & chiefly man-made except man-made/wool blends	3,215	3,109	+ 3.4
All wool & chiefly wool	3,114	2,834	+ 9.9
All other fabric	377	331	+ 13.9
Fabric, n.s.k.	504	491	+ 2.6

(continued)

PRODUCTION

By Fabric

Production of Reported Categories of Men's Tailored Wear By Fabric, 1983, 1984

(Thousands of units)
(continued)

	1984	1983	% Change 1984/1983
Overcoats, topcoats and tailored suburban and car coats, including uniform	1,768	1,968	- 10.1
By fabric:			
All man-made & chiefly man-made	741	726	+ 2.1
All wool & chiefly wool	679	701	- 3.1
All other fabric	286	459	- 37.7
Fabric, n.s.k.	62	82	- 24.4
Men's & boys' raincoats, including uniform	3,173	2,896	+ 9.6
Plastic (with or without fabric trim) Rubberized and/or coated fabric	1,641	1,566	+ 4.0
Uncoated fabric:			
All cotton & chiefly cotton	27	25	+ 8.0
All man-made & chiefly man-made	1,026	920	+ 11.5
All other fabric	41	46	- 10.9
Fabric, n.s.k.	438	339	+ 29.2
Tailored suit-type dress & sport coats including uniform	20,656	19,216	+ 7.5
By fabric:			
All cotton & chiefly cotton	1,477	890	+ 66.0
Man-made/wool blends, chiefly man-made	5,674	4,544	+ 24.9
All man-made & chiefly man-made except man-made/wool blends	6,228	7,601	- 18.1
All wool & chiefly wool	6,175	4,751	+ 30.0
All other fabric	816	749	+ 8.9
Fabric, n.s.k.	286	681	- 58.0
Separate vests, excluding sweater vests	1,323	1,395	- 5.2
By fabric:			
All cotton & chiefly cotton	222	125	+ 77.6
All man-made & chiefly man-made	874	860	+ 1.6
All wool and chiefly wool	198	66	+200.0
All other fabric	7	18	- 61.1
Fabric, n.s.k.	22	326	- 93.3

(continued)

PRODUCTION

By Fabric

Production of Reported Categories of Men's Tailored Wear By Fabric, 1983, 1984

(Thousands of units)
(continued)

	1984	1983	% Change 1984/1983
Separate dress & sport trousers, including uniform	122,965	113,016	+ 8.8
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	15,900	15,341	+ 3.6
Man-made/wool blends, cheifly man-made	20,961	14,296	+ 46.6
All man-made & chiefly man-made, except man-made/wool blends	61,176	60,782	+ 0.6
All wool & chiefly wool	8,881	7,419	+ 19.7
All other fabric	7,907	6,077	+ 30.1
Knit fabric:			
All cotton & chiefly cotton	(D)	(D)	--
All man-made & chiefly man-made	6,832	7,186	- 4.9
Fabric, n.s.k.	(D)	(D)	--

n.s.k. not specified by kind.
(D) withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1
(July 1985).

Materials Consumed in Production

Materials Consumed in Production of Men's & Boys' Tailored Clothing, 1977, 1982

(Delivered cost in millions of dollars)

	1982	1977	% Change 1982/1977
Men's & boys' suits & coats, total	$897.7	$846.8	+ 6.0%
Broadwoven fabrics	500.8	445.2	+ 12.4
Purchased knitted fabric	75.3	57.1	+ 31.9
All other materials, components, parts, containers and supplies	184.2	161.5	+ 14.1
Materials, parts, containers & supplies, n.s.k.	137.4	183.0	- 24.9
Men's & boys' separate trousers, total	695.2	658.2	+ 5.6
Broadwoven fabrics	370.9	316.5	+ 17.2
Purchased knitted fabric	119.4	94.5	+ 26.3
All other materials, components, parts, containers and supplies	126.3	111.0	+ 13.8
Materials, parts, containers & supplies, n.s.k.	78.6	136.2	- 42.3

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in Production of Men's & Boys' Tailored Clothing, 1977, 1982

(Delivered cost in millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Waterproof outergarments, total	$157.1	$105.2	+ 49.3%
Broadwoven fabrics	99.8	51.6	+ 81.1
Purchased knitted fabrics		3.3	
All other materials, components, parts, containers & supplies	35.2	21.7	+ 62.2
Materials, parts, containers & supplies, n.s.k.	22.1	28.6	- 22.7

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
MC82-I-23A; MC82-I-23D.

Seasonal Patterns in Production

The table below shows the 1983 and 1984 distribution of cuttings by months in specified types of tailored wear, as reported in the Current Industrial Reports.

Men's Tailored Wear
Percent of Years Cuttings by Month, 1983, 1984

	Suits		Overcoats & topcoats		Sport & dress coats		Sport & dress trousers	
	1984	1983	1984	1983	1984	1983	1984	1983
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	9.1	9.0	7.7	7.0	8.0	7.3	8.7	7.4
February	8.8	8.8	7.1	8.3	8.7	7.3	10.5	8.4
March	9.7	8.6	8.3	9.6	9.0	8.6	9.3	9.4
April	8.1	7.2	9.4	7.0	9.3	8.4	8.4	8.5
May	8.6	7.8	9.0	7.2	9.5	8.7	9.2	7.9
June	7.8	7.8	7.4	7.4	9.3	9.8	8.1	9.3
July	6.1	5.3	7.4	5.5	7.3	8.1	6.4	6.5
August	8.9	8.0	8.4	8.1	8.5	9.2	9.0	9.2
September	8.9	8.8	9.4	10.6	8.0	8.6	7.9	8.4
October	8.2	10.2	10.2	12.3	8.6	8.8	8.7	8.9
November	9.5	10.2	8.1	10.0	7.8	8.3	7.7	9.3
December	6.5	8.2	7.7	7.0	6.0	6.9	6.1	6.8

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(85)-1
(July 1985).

PRODUCT SHIPMENTS

Product shipments include all products of a specified type, regardless of the industry classification of the producer, in contrast to industry shipments which cover both primary and secondary products made within a specific industry classification. For reporting purposes under the Census Bureau system, a manufacturer is classified in only one industry based on its primary product.

The International Trade Administration (1985 U.S. Industrial Outlook) has estimated that in "real" terms, based on the value of the 1972 dollar, shipments of men's and boys' coats and suits by all U.S. producers in 1984 gained 19.8% compared with shipments in 1983. In real terms, shipments of men's and boys' separate trousers in the same period were up an estimated 21.4%.

More detailed information on the value of product shipments in the men's tailored wear industry is available from the Census Bureau in the Current Industrial Reports. According to the latest CIR covering the years 1983 and 1984, the only category to register a decline is men's overcoats (-3.1%). Overall, the value of shipments of men's tailored clothing climbed 7.9% in 1984, reaching $4 billion. The fastest growing categories in 1984 were separate vests up 22.7% and dress and sport coats (up 10.3%).

Value of Shipments of Reported Men's Tailored Wear, 1983, 1984
(Millions of dollars)

	1984	1983	% Change 1984/1983
Total, all reported tailored wear	$4,030.3	$3,736.3	+ 7.9%
Tailored suits, including uniform	1,175.2	1,111.2	+ 5.8
Overcoats, topcoats & tailored suburban & car coats, including uniform	103.0	106.3	- 3.1
Men's & boys' raincoats incl. uniform	107.7	105.0	+ 2.6
Tailored suit-type dress & sport coats, including uniforms (men's)	1,060.4	961.1	+10.3
Separate dress & sport trousers, incl. uniform	1,562.9	1,435.5	+ 8.9
Separate vests, excluding sweater vests	21.1	17.2	+22.7

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1.

PRODUCT SHIPMENTS

The most comprehensive figures on shipments by all producers are covered in the complete census of manufactures, compiled by the Census Bureau every five years. The results of the latest census covering 1982 compared with 1977 are shown below. It must be noted that the census bureau data does not take into account inflation during the period covered which was significant between 1977 and 1982.

Between 1977 and 1982, the value of shipments of men's tailored wear increased 14.8%, reaching a total of $2.8 billion.

Tailored Wear & Rainwear Product Shipments By All Producers, 1977, 1982

	Value of Shipments (Mil. $)			Quality of Shipments (Thousands of Units)		
	1982	1977	% Change 1982/77	1982	1977	% Change 1982/77
Suits & coats, total	$2,778.6	$2,420.3	+14.8	na	na	--
Men's suits	1,098.1	1,128.8	- 2.7	11,543	17,548	-84.2%
Men's overcoats & topcoats	120.3	194.1	-38.0	2,646	5,735	-53.8
Men's tailored dress & sport coats & jackets	923.7	604.1	+52.9	18,011	16,827	- 7.0
Contract work on men's & boys' suits & coats	493.6	371.5	+32.9	na	na	--
Men's & boys' suits, coats & overcoats, n.s.k.	142.9	121.8	+17.3	na	na	--
Separate trousers, total	1,965.2	1,540.6	+27.6	na	na	--
Men's separate dress & sport trousers	1,411.2	1,217.5	+15.9	115,117	121,984	- 5.6
Contract work on men's & boys' separate trousers	462.2	264.5	+74.7	na	na	--
Separate trousers, n.s.k.	91.8	58.6	+56.7	na	na	--
Waterproof outergarments, total	187.0	158.1	+18.3	na	na	--
Men's & boys' raincoats	116.5	105.0	+11.0	2,979	5,340	-44.2
Contract work on raincoats	37.5	25.8	+45.3	na	na	--
Raincoats, n.s.k.	33.0	27.3	+20.9	na	na	--

n.s.k. not specified by kind.
na not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
MC82-I-23A; MC82-I-23D.

PRODUCT SHIPMENTS

By Geographic Region

Pennsylvania was the leading state for shipments in four of the seven categories of men's tailored clothing measured by the Census Bureau in 1982. The only category in which the leading state in 1982 differed from 1977 was the overcoats and topcoats group where Pennsylvania climbed from third position to surpass New York and Massachusetts for the top spot.

The only categories in which Pennsylvania was not the leading state for shipments were separate dress and sport trousers (Texas), commission work on dress & sport trousers (California) and waterproof outergarments (Maryland).

Value of Product Shipments of Tailored Wear and Rainwear
By Leading State, 1977, 1982
(Millions of dollars)

	Value of Shipments 1982	Value of Shipments 1977	% Change 1982/1977
Men's suits, including leisure & uniform			
U.S. total	$1,078.6	$1,273.4	- 15.3%
Leading states:			
Pennsylvania	232.2	274.3	- 15.3
New York	161.6	248.1	- 34.9
Ohio	140.3	75.5	+ 85.8
Georgia	124.0	96.8	+ 28.1
Massachusetts	98.7	100.1	- 1.4
Leading states total	756.9	794.8	- 4.8
Percent of U.S. total	70.1%	62.4%	--
Men's overcoats & tailored car coats			
U.S. total	126.1	179.8	- 29.8
Leading states:			
Pennsylvania	25.9	16.7	+ 55.1
Massachusetts	22.3	37.6	- 40.7
New York	21.1	18.7	+ 12.8
Minnesota	6.2	14.8	- 58.1
Leading states total	75.5	87.8	- 14.0
Percent of U.S. total	59.6%	48.8%	--
Men's tailored dress & sport coats & jackets			
U.S. total	944.0	623.0	+ 51.5
Leading states:			
Pennsylvania	216.1	179.5	+ 20.3
Texas	124.2	na	--
Massachusetts	122.4	63.6	+ 92.4
Georgia	78.6	27.8	+182.7
Ohio	77.2	27.3	+182.8
Maryland	76.7	20.1	+281.6
Leading states total	695.2	na	--
Percent of U.S. total	73.6%	na	--

By Geographic Region

Value of Product Shipments of Tailored Wear and Rainwear By Leading State, 1977, 1982
(Millions of dollars)
(continued)

	Value of Shipments 1982	Value of Shipments 1977	% Change 1982/1977
Commission work on men's & boys' suits & coats			
U.S. total	$ 493.6	$ 371.5	+ 32.9%
Leading states:			
Pennsylvania	89.2	72.9	+ 22.3
New York	63.4	55.6	+ 14.0
Georgia	55.7	48.3	+ 15.3
Tennessee	47.8	19.3	+147.7
New Jersey	38.4	20.7	+ 85.5
Leading states total	294.5	216.8	+ 35.8
Percent of U.S. total	59.7%	58.4%	--
Men's & boys' separate dress & sport trousers			
U.S. total	1,588.9	1,308.3	+ 21.4
Leading states:			
Texas	305.4	246.7	+ 23.8
Georgia	208.8	151.1	+ 38.2
New York	154.1	168.1	+ 8.3
Tennessee	148.2	98.3	+ 50.8
Missouri	83.9	16.6	+405.4
Leading states total	900.4	680.8	+ 32.3
Percent of U.S. total	56.7%	52.0%	--
Commission work on men's & boys' dress & sport trousers			
U.S. total	426.7	264.5	+ 61.3
Leading states:			
California	70.5	51.3	+ 37.4
Texas	69.6	8.9	+682.0
Alabama	63.0	35.1	+ 79.5
Pennsylvania	49.1	36.1	+ 36.0
Mississippi	36.3	21.8	+ 66.5
Leading states total	288.5	153.2	+ 88.3
Percent of U.S. total	67.6%	57.9%	--

(continued)

PRODUCT SHIPMENTS

By Geographic Region

Value of Product Shipments of Tailored Wear and Rainwear
By Leading State, 1977, 1982
(Millions of dollars)
(continued)

	Value of Shipments		% Change
	1982	1977	1982/1977
Raincoats & other waterproof outerwear			
U.S. total	$ 357.0	na	--
Leading states:			
Maryland	133.9	na	--
New York	53.7	na	--
Massachusetts	24.2	na	--
Florida	8.3	na	--
California	2.5	na	--
Leading states total	222.6	na	--
Percent of U.S. total	62.4	na	--

na not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
MC82-I-23A; MC82-I-23D.

PRODUCER PRICES

Between August 1984, and August 1985, three categories of the men's & boys' tailored clothing industry recorded declines in their producer (factory) price index. Overall, only four of the 11 categories recorded changes less than the 1.1% decline in men's and boys' wear price levels. The largest decline between August 1984 and 1985 was for cotton trousers, except uniform (-11.0%).

Producer Price Indexes for Selected Types of
Men's Tailored Wear
(12/80=100, unless otherwise specified)

	August Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Apparel (1967=100)	204.7	201.0	- 1.8%	201.1	197.4	+ 1.9%
Men's & boys' wear (1967=100)	230.8	228.3	+ 1.1	227.4	222.4	+ 2.2
Regular weight suits of wool or wool blends	127.3	121.1	+ 5.1	122.7	na	--
Regular weight suits of cotton or cotton blends	127.2	118.9	+ 7.0	120.2	116.1	+ 3.5

(continued)

PRODUCER PRICES

Producer Price Indexes for Selected Types of Men's Tailored Wear

(12/80=100, unless otherwise specified)
(continued)

	August Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Regular weight suits of other fabrics	110.4	110.1	+ 0.3%	110.0	na	--
Light weight suits of cotton or cotton blends	118.3	114.2	+ 3.6	114.3	na	--
Light weight suits of other fabrics	122.3	114.0	+ 7.3	116.0	na	--
Trousers, exc. uniform of cotton (12/81=100)	92.2	103.6	-11.0	103.7	101.8	+ 1.9
Trousers, exc. uniform of wool (12/81=100)	107.1	104.8	+ 2.2	104.7	103.7	+ 1.0
Trousers, exc. uniform of other fabrics (12/81=100)	106.2	106.6	- 0.4	106.4	104.6	+ 1.7
Business-type sport coats of wool or wool blends	124.9	120.2	+ 3.9	120.1	na	--
Business-type sport coats of cotton or cotton blends	121.0	118.0	+ 2.5	116.3	na	--
Business type sport coats of other fabrics	115.0	115.4	- 0.3	112.9	110.2	+ 2.5

na not available

Source: U.S. Bureau of the Labor statistics.

FOREIGN TRADE

Imports continue to spiral in the men's and boys' tailored and rainwear industries as in most other segments of the apparel industry, due primarily to the cost advantages of lower labor costs in developing countries and the unprecedented strength of the U.S. dollar.

Imports of men's and boys' suits in 1984 accounted for 22% of new supply, up from 17% in 1982. During this same period, exports of suits as a percent of shipments declined from 1.3% to 0.6%.

Selected Men's & Boys' Tailored Wear Industry Supply Situation, 1982-1984

(Value in millions of dollars)

	Men's & Boys' Suits & Coats			Men's & Boys' Separate Trousers		
	1984	1983	1982	1984	1983	1982
Value of imports	$888.0	$660.2	$613.3	na	na	na
Imports as a % of new supply	22.3%	18.5%	17.2%	na	na	na
Value of exports	$ 16.0	$ 17.2	$ 31.8	$62.0	$42.9	$44.6
Exports as a % of shipments	0.6%	0.7%	1.3%	3.0%	2.5%	2.6%

na not available

Source: 1985 U.S. Industrial Outlook,
International Trade Administration.

Imports

According to the U.S. Bureau of the Census, the value of imports of all reported categories of men's and boys' tailored clothing and rainwear in 1984 increased 35.1% over the previous year, reaching a total of $1.7 billion. In terms of units the increase between 1983 and 1984 was 26% climbing to a total of 17 million dozen.

The fastest growing category in 1984 in terms of both units and dollars was wool coats except suit type. This category more than doubled the value of its imports as well as the quantity of its imports in the one year period. The only other group which doubled both its value and quantity in 1984 was man-made suit type sport coats and jackets.

Not one category of men's tailored clothing or rainwear registered a decrease in the value or quantity of its imports in 1984 according to the Census Bureau.

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1984, 1983

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1984	1983	1984/1983	1984	1983	1984/83
Total reported categories	17,002.5	13,489.4	+ 26.0%	$1,701.6	$1,259.1	+ 35.1%
Suits, total	423.5	259.3	+ 63.3	218.4	138.1	+ 58.1
Wool	214.5	136.0	+ 57.7	149.3	98.4	+ 51.7
Man-made	209.0	123.3	+ 69.5	69.1	39.7	+ 74.1
Suit-type sport coats & jackets, total	683.9	434.8	+ 57.3	170.7	105.5	+ 61.8
Wool	181.0	107.5	+ 68.4	71.2	41.3	+ 72.4
Cotton	234.0	195.0	+ 20.0	43.6	36.9	+ 18.2
Man-made	268.9	132.3	+103.3	55.9	27.3	+104.7

(continued)

FOREIGN TRADE

Imports

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1984, 1983
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1984	1983	1984/1983	1984	1983	1984/83
Trousers**, total	11,941.2	10,372.1	+ 15.1	778.9	599.3	+ 30.0
Wool	283.8	274.5	+ 3.4	56.5	46.2	+ 22.3
Cotton	6,463.2	6,058.1	+ 6.7	424.8	368.3	+ 15.3
Man-made	5,239.2	4,039.5	+ 29.7	297.6	184.8	+ 61.0
Coats, excl. suit-type						
total	3,870.8	2,382.1	+ 62.5	502.7	369.2	+ 36.2
Wool	111.9	47.2	+137.0	45.5	20.0	+127.5
Cotton	1,109.6	985.6	+ 12.6	140.8	116.6	+ 20.8
Man-made	2,649.3	2,349.3	+ 12.8	316.4	259.6	+ 21.9
Raincoats	83.1	41.1	+102.1	30.9	20.0	+ 54.5

* The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

** This category also includes slacks and shorts made from these fibers.

Source: U.S. Bureau of the Census,
U.S. General Imports.
FT 135, December 1983, 1984.

Exports

Exports of most types of men's & boys' tailored clothing registered an increase in 1984. Suits and raincoats, however, recorded declines in exports in 1984 versus 1983. Suits were off 16.4% in quantity and 27.6% in value; raincoats fell 23.4% in quantity and 10.1% in value.

FOREIGN TRADE

Exports

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1983, 1984

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1984	1983	1984/1983	1984	1983	1984/1983
Total, all reported categories	na	1,518.3	--	na	$52,488.6	--
Suits, total	28.1	33.6	- 16.4%	$1,932.6	2,668.4	- 27.6%
Knit:						
Cotton	10.3	3.8	+171.1	538.5	592.5	- 9.1
Man-made	7.4	18.4	- 59.8	352.3	851.4	- 58.6
Not knit:						
Wool	0.3	0.4	- 25.0	194.8	165.5	+ 17.7
Cotton	1.9	3.8	- 50.0	187.8	294.3	- 36.2
Man-made	8.2	2.4	+241.6	659.2	406.7	+ 62.1
Suit-type sport coats & jackets, total	73.9	56.8	+ 30.1	4,468.0	2,826.1	+ 58.1
Knit:						
Cotton	35.5	20.8	+ 70.7	1,248.6	572.8	+118.0
Man-made	12.3	13.4	- 8.2	312.7	737.7	- 57.6
Not knit:						
Wool	1.5	1.0	+ 50.0	535.5	370.6	+ 44.5
Cotton	7.7	2.7	+185.2	1,290.7	385.5	+234.8
Man-made	16.9	18.9	- 10.6	880.5	759.5	+ 15.9
Trousers & slacks, total	na	982.4	--	na	30,857.4	--
Knit:						
Cotton	147.8	112.3	+ 31.6	4,956.9	3,424.3	+ 44.8
Man-made	143.2	49.9	+187.0	3,412.5	2,341.3	+ 45.8
Not knit:						
Wool	na	5.3	--	na	278.5	--
Cotton	560.6	467.0	+ 20.0	19,637.4	15,321.1	+ 28.1
Man-made	633.7	347.9	+ 82.2	15,981.6	9,492.2	+ 68.3
Coats & jackets, excl. suit-type, incl. rainwear, total	660.0	437.8	+ 50.8	16,661.8	15,947.4	+ 4.5
Knit:						
Cotton	73.0	61.6	+ 18.5	2,424.5	3,045.9	- 20.4
Man-made	216.1	169.4	+ 27.6	2,368.2	2,909.7	- 18.6
Not knit:						
Wool	5.6	1.6	+250.0	1,248.7	440.6	+183.4
Cotton	25.3	20.2	+ 25.2	4,973.4	3,879.9	+ 28.2
Man-made	340.0	185.0	+ 83.8	5,647.0	5,671.3	- 0.4
Raincoats of textile fabrics, coated, filled or laminated	5.9	7.7	- 23.4	170.1	189.3	- 10.1

(footnotes on following page)

na not available.

* The value is generally equivalent to a F.A.S. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports-Schedule E,
Commodity by Country FT446,
December 1983, 1984.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to the U.S. Census Bureau projections, the number of American males aged 35-54 years will swell to 40.8 million by 2005, a 56.9% increase over 1984. During the same time period, the ranks of males aged 55-64 will continue on an upward spiral and will number approximately 14.0 million in 2005, a jump of 35.5% over 1984. Better than four out of every 10 males will fall into these age brackets in 2005, compared with three out of 10 in 1984.

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 16 years	28,331	30,746	29,723	+ 4.9	24.6	24.6	22.1
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984).

THE POTENTIAL MARKET

Male Population

The boom in the 35-54 year old category has led this group to become the prime target market for retailers of men's tailored wear. In addition to the shear growth in numbers, this age group has more years of schooling and tend to be in "better" jobs, where tailored clothing is more of the norm. According to the U.S. Bureau of Labor Statistics, better than one out of four males in the labor force now has a college degree, with 33% of 35-54 year olds having one.

This has led marketers of tailored wear to change their merchandise mix to include more updated looks in order to cater to one market which is now in its prime year, and spending proportionally more to make better impressions in the work place.

Male Height/Weight Groups

The following table covers 1983 estimates on the current male population (18-74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services, and the U.S. Census Bureau.

Close to 2.6 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch and six feet one inch height range.

Estimated Distribution of the U.S. Male Population
By Height/Weight Groups, 1983
(Numbers in thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	78,116	10,624	28,044	36,870	2,578
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	17,576	5,312	7,187	4,921	156
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	32,652	3,906	13,826	14,530	391
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,389	938	4,687	9,061	703
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,374	391	1,952	6,249	781
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,125	78	391	2,109	547
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979, & U.S. Bureau of Census population projections.

THE POTENTIAL MARKET

Male Height/Weight Groups

One area of men's apparel which has been getting more attention of late has been special sizes such as big and tall, as well as short men. Current estimates for this category are about 10% of total spending for men's wear or about $35 million (including all types of men's apparel).

Most larger retailers have gotten out of the special size business over the last several years with current estimates being that between 80% and 90% of the category sales are now done in specialty stores. The main difficulty seen by larger retail organizations is that the special size departments require two to three times the number of sku's as a conventional department and thus eats up more inventory dollars and valuable floor and storage space. Likewise the department requires constant attention from merchandising personnel which adds to increased costs.

Employment

As previously mentioned, higher educational attainment has led to a higher proportion of males in the labor force to be in better-paying managerial type jobs. Through the recession of 1981 and 1982, managerial employment did not suffer as much as other areas and as the economy continues to gain, so does managerial and professional employment.

Even as the growth of the economy slows to more normal, traditional rates, employment in the managerial and professional category continues to outperform the economy overall.

The growth in middle and upper level management bodes well for the tailored wear as these people are most likely to buy the category. Combined with the move of the baby boom generation into its prime earning years, higher education and growth of the white collar job market, the outlook for the tailored wear industry on the retail level remains bright.

Male Employment by Occupation, 1983, 1984, September 1984, September 1985
(Males 16 years of age & older)
(Numbers in thousands)

	September Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Total male employed	60,397	59,714	+ 1.1%	59,091	56,787	+ 4.1%
Managerial & professonal specialty	15,151	14,547	+ 4.1	14,529	13,933	+ 4.3
Executive, administration & managerial	7,988	7,733	+ 3.3	7,683	7,282	+ 5.5
Professional specialty	7,163	6,814	+ 5.1	6,846	6,651	+ 2.9
Tech., sales & admin. support	11,715	11,714	--	11,556	11,078	+ 4.3
Technicians & related support	1,780	1,650	+ 7.9	1,646	1,582	+ 4.0
Sales occupations	6,554	6,571	- 0.3	6,550	6,201	+ 5.6
Admin. support incl. clerical	3,381	3,493	- 3.2	3,114	3,361	- 7.3
Service occupations	5,673	5,432	+ 4.4	5,545	5,430	+ 2.1
Precision production, craft & repair	12,169	12,008	+ 1.3	11,945	11,328	+ 5.4
Operators, fabricators & laborers	12,697	12,780	- 0.6	12,479	11,809	+ 5.7

Source: U.S. Bureau of Labor Statistics, *Employment & Earnings*.

RETAIL SALES

Current Trends

As reported in the Softgoods Outlook, 1985, compiled by Kurt Salmon Associates, unit sales increases for all men's wear measured 4.2% in 1984. Sportcoats were up 22%; slacks, + 14%; raincoats, + 16%; suits, + 2%.

Sales projections for 1985 by this source indicate a better rate of gain in suit sales, a lower rate in sales of slacks and sport jackets.

Retail Sales of Selected Men's Apparel Categories
(Percentage change in units purchased by consumers)

	Projected 1985/1984	1984/1983	1983/1982	1982/1981
Men's wear*	+ 3%	+ 4.2%	+ 1.5%	+ 0.5%
Suits	+ 4	+ 2.0	- 2.0	-12.0
Sport jackets	+ 5	+22.0	- 6.0	+13.0
Slacks	+ 8.0	+14.0	+10.0	- 2.0
Rainwear	nr	+16.0	- 2.0	+ 1.0

* Includes types of men's wear not separately listed (funishings, overcoats, etc.)
nr not reported

Source: Kurt Salmon Associates,
The Softgoods Outlook, 1985,
(based on MRCA Panel Data).

The manner in which retailers have been handling their ordering of tailored wear has changed dramatically in the last several years. Traditionally, retailers had placed the bulk of the clothing seasons needs--75% or more--up front, before the season started. Now, the norm has become to place only about 50% of the needs up front and to stay in a more flexible position with regard to finances and inventory control. This allows retailers to adapt more easily to fluctuations in their business.

This change in the buying pattern has led to an increase in discounting by manufacturers and to an increase in the importance of discount chains in the men's tailored industry. Manufacturers are reported to have reduced wholesale prices by as much as 30% in the Spring of 1985 in order to clear their inventories of unsold merchandise.

According to a recent survey, conducted by MPA Research, and published in the Wall Street Journal (2/8/85), the average man in a major city spent $931 on business clothing annually versus $584 for sportswear.

RETAIL SALES BY PRODUCT

Suits

While retail sales of better-priced suits held up well during the recessionary period of the early 1980's, sales of moderate and lower priced suits suffered. Analysts had hoped that after the recession moderate priced sales would recover, however, this does not seem to have happened. While sales of better priced suits continue strong in 1985, the moderate and lower priced categories continue to decline.

The trend towards dressing up in more traditional outfits which has benefitted other segments of the men's tailored wear industry has not been that helpful in the suit segment. The recession of the early 1980's made consumers more cautious and most consumers are still purchasing separates which are cheaper but can function as suits. This does not hold true, however, for upper-priced suits where the customers are more affluent and less concerned about the expenditures for tailored clothing and so more quality conscious.

According to MRCA Information Services, a Stamford, Ct. based consumer research firm, the number of men's suits purchased fell from 27 million in 1980 to 18 million in 1984. This translates into a decline in spending of about $400 million in 1984, compared with 1980.

Sportcoats

Sportcoats have been the most consistant gainers in the men's tailored wear industry over the last several years. Benefitting from the desire of men to dress in more traditional outfits, a trend that had its start in the recessions of the early 1980's, as well as the relative inexpensiveness of the category compared with the alternatives, this category has shown a decline in sales in only one year since 1981.

As is the trend in suits as well as most other segments of the tailored wear industry, the better priced categories have fared better than any other category.

Overcoats & Topcoats

Another area which has been helped by the traditional dress-up trend has been the tailored topcoat. For many years the topcoat industry sales have been highly related to weather conditions. The more severe the winter, the better the sales of topcoats. Over the last two years, however, the topcoat industry has been on the climb.

As with most other areas of the tailored wear industry, better-priced goods are outperforming the moderately-priced lines. Some retailers have reported that sales of men's cashmere topcoats are as much as 40% higher in 1985 than last year.

The number of all men's coats purchased in 1984 was 2 million fewer than in 1980 according to MRCA, with spending $90 million less.

RETAIL SALES BY TYPE OF OUTLET

The U.S. Bureau of the Census has recently released reports on retail sales of specific major merchandise categories by type of retail outlet, based on the complete census of retail trade covering operations in 1982.

Information on total sales of men's and boys' wear in all retail outlets which have a payroll is included in the published census reports. Information on sales of specific types of men's wear is limited to department stores, men's wear stores and family clothing stores. However, these are the major outlets --accounting for over 85% of total men's and boys' wear sales in all types of retail outlets with payroll in 1982.

Total sales of men's tailored and casual wear (as classified in the Census Bureau) in the three major outlet types amounted to $10.3 billion in 1982 and represented 41.2% of total men's and boys' wear business in these three outlet types.

Men's Tailored Clothing/Casual Wear in Leading Outlet Types, 1982
(Includes only stores with payroll)

	Overcoats, Topcoats, Raincoats*				Suits & Formal Wear			
	Stores***		Sales		Stores***		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Reported total	30,070	100.0	$1,750.3	100.0	22,050	100.0	$2,342.5	100.0
Department stores	6,446	21.4	773.9	44.2	3,816	17.3	542.0	23.1
Men's wear stores	13,124	43.6	579.1	33.1	11,638	52.8	1,489.1	63.6
Family clothing stores	10,500	35.0	397.3	22.7	6,596	29.9	311.4	13.3

	Sportcoats/Blazers				Dress/Casual Slacks & Jeans**			
	Stores**		Sales		Stores***		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Reported total	23,843	100.0	$1,577.4	100.0	38,266	100.0	$4,672.9	100.0
Department stores	4,606	18.5	531.7	33.7	8,419	22.0	1,751.7	37.5
Men's wear stores	12,164	49.0	809.8	51.3	15,038	39.3	1,417.3	30.3
Family clothing stores	8,073	32.5	235.9	15.0	14,809	38.7	1,503.9	32.3

Contribution to Total Sales of All Men's & Boys' Wear in Reported Retail Outlet Types

	Total Men's & Boys' Wear Sales	Men's Tailored/Casual Wear Sales	
	Mil. $	Mil. $	% of Total Men's & Boys' Wear Sales
Reported total	$25,117.9	$10,343.1	41.2%
Department stores	12,812.0	3,599.3	28.1
Men's wear stoers	7,052.6	4,295.3	55.0
Family clothing stores	5,253.3	2,448.5	41.0

* Outer jackets are also included in this classification.

** Walking shorts are also included.

*** Each store location is separately counted, not just headquarter store locations. Leased departments are not included in the stores in which operated, but are treated as separate establishments in the pertinent kind-of-business classification.

Source: Based on U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY STORE TYPE

Department Stores

Reports on merchandise line sales in department stores have been made available in recently-issued reports covering the complete 1982 census of retail trade, compiled by the U.S. Census Bureau. Under the Standard Industrial Classification system followed in government reports, department stores include all outlets meeting the definition by store size and merchandise handled, including discount department stores as well as traditional department stores, and the department store operations of such national chains as Sears Roebuck and Montgomery Ward.

The number of department stores reporting sales of the specified types of men's tailored/casual wear and the sales of this merchandise in 1982 are shown in the table below.

Men's Tailored/Casual Wear Sales in Department Stores, 1982

		Men's Tailored/Casual Wear Sales		
	No. of Stores Reporting Sales		% of Total Store Sales	
		Thous. $	Stores Handling Line	All Dept. Stores
Reported total	--	$3,599,284	4.8%	3.6%
Men's				
Overcoats/topcoats*	6,446	773,908	1.0	0.8
Suits & formal wear	3,816	541,974	1.0	0.5
Sportcoats & blazers	4,606	531,700	0.8	0.5
Dress & casual slacks, jeans, walking shorts	8,419	1,751,702	2.0	1.8

* Includes raincoats and outer jackets.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3.

While department stores still control the majority of upper priced men's tailored wear, most larger department stores have abandoned the lower priced category to the mass merchandisers and specialty stores. This trend is also evident in the special sizes categories where department stores are leaving the trade to other outlets types.

In recent seasons, many department stores have attempted to reassert themselves in better tailored clothing lines, but remain cautious. Many stores are now zeroing in on a limited number of brands and designer labels, and are themselves developing private label programs to fill in their basic needs. Many are also waiting to see which manufacturers and which importers are overstocked in order to provide themselves with off-price merchandise close to the selling season.

RETAIL SALES BY STORE TYPE

Specialty Stores

The 1982 census of retail trade collected the following information on sales of men's tailored and related apparel in men's wear stores and in family clothing stores. There was a notable drop in the contribution to men's wear stores' total sales made by men's suits and formal wear in 1982 compared with findings in the 1977 census--19.3% vs. 33.5%. The sales share reported for overcoats, topcoats and raincoats rose from 3.0% in 1977 to 7.5% in 1982; sales of sportcoats and blazers rose from 4.9% of total men's wear store sales in 1977 to 10.5%; dress and casual slacks, jeans and walk shorts, from 14.8% to 18.3%.

The combined total of the reported men's categories listed above represented 56.2% of men's specialty store sales in 1977, 55.6% in 1982. In family clothing stores, the comparable figures were 17.2% (1977) and 18.3% (1982).

Men's Tailored/Casual Wear Sales in Specialty Stores, 1982
(Covers stores with payroll only)

		Men's Tailored/Casual Wear Sales		
	No. of Stores Reporting Sales		% of Total Store Sales	
		Thous. $	Stores Handling Line	All Specialty Stores
MEN'S WEAR STORES				
Reported total	--	$4,295,166	34.3%	55.6%
Men's				
Overcoats, topcoats, raincoats*	13,124	579,066	9.4	7.5
Suits & formal wear	11,638	1,489,066	26.0	19.3
Sportcoats & blazers	12,164	809,768	13.7	10.5
Dress & casual slacks, jeans, walking shorts	15,038	1,417,266	20.6	18.3
FAMILY CLOTHING STORES				
Reported total	--	$2,448,483	25.2%	18.3
Men's				
Overcoats, topcoats, raincoats*	10,500	397,329	4.3	3.0
Suits & formal wear	6,596	311,368	5.0	2.3
Sportcoats & blazers	8,073	235,859	3.2	1.8
Dress & casual slacks, jeans, walking shorts	14,809	1,503,927	12.7	11.2

* Also includes outer jackets for men.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY STORE TYPE

Department Store Operating Results

The National Retail Merchants Association reports that in 1983, sales of all men's apparel was up 10% in department stores while men's clothing registered an increase of 9.6% during the same period. Sales of suits and formal wear were reported to have increased 2.7% in department stores in 1983 while overcoats, topcoats, rain, storm & dual-purpose coats as a group marked an increase of 9.4%.

Men's Departmental Merchandising & Operating Results in Department Stores with Total Annual Sales Over $1 Million, 1983
Typical (median) Results

	Adult Male Apparel	Men's Clothing	Overcoats, Topcoats, Rain, Storm, & Dual-purpose Coats	Suits & Formal Wear
Net sales, % change from last year	+ 10.0%	+ 9.6%	+ 9.4%	+ 2.7%
Sales, % of merchandise division	100.0	38.4	5.4	5.5
Sales, % of total store sales	12.7	5.1	0.7	0.7
$ sales per square foot of selling space	$182.8	$163.0	$181.9	$140.1
Cumulative markon, %	50.9	50.5	51.0	50.2
Gross margin, % of sales including cash discounts	43.1	38.5	42.8	28.8
Markdowns, retail, % of sales	15.5	20.4	19.3	30.9
Returns, % of sales	8.3	10.0	13.6	10.6
Number of stock turns	2.9	2.6	3.3	2.7
Salespeople's salaries, % of sales	6.7	7.2	5.7	7.5
Sales promotions, % of sales	3.0	3.3	3.9	3.6

na not available.

Source: National Retail Merchants Association,
"Merchandising & Operating Results",
1984 Edition.

According to Retail Merchandising Service Automation of Riverside, California, retail sales on men's suits in specialty stores increased 3.2% in the first quarter of 1985 after recording a 0.3% increase for the full year of 1984. Dress slacks, which declined 1.5% in terms of specialty stores sales in 1984, continue their decline in 1985, falling 2.4% in the first quarter. Tailored outerwear according to RMSA reversed a climb of 1.1% in 1984. It then registered a decline of 1.1% in the first three months of 1985.

RMSA bases its estimates of men's specialty store sales on a nationwide survey of about 1,800 specialty stores which carry men's apparel.

RETAIL SALES BY STORE TYPE

Seasonal Patterns

Average Purchase Rate Per 1,000 Households, 1984
(In units)

	Sportcoats/Suits	Coats/Raincoats
Monthly average	38.4	59.8
January	42.0	61.9
February	43.7	43.9
March	41.3	55.0
April	30.7	37.9
May	34.7	27.1
June	39.7	28.1
July	23.7	19.4
August	28.8	29.8
September	31.9	52.4
October	32.1	73.9
November	42.7	112.7
December	70.1	176.0

Source: Newspaper Advertising Bureau based on
MRCA Information Services, 1984.

RETAIL ADVERTISING

Reports on newspaper advertising linage for 1984 show that the heaviest months for advertising of men's suits are March, followed by September and April. Retail advertising for slacks, in 1984 was heaviest in June and August, while for sportcoats, the heaviest months were December, October, and November.

Percent of Year's Total Newspaper Advertising Linage on Men's Clothing
By Months, 1984

	Slacks	Sportcoats	Suits
Total	100.0%	100.0%	100.0%
January	3.6	5.0	4.4
February	6.2	7.0	6.8
March	8.2	7.5	12.0
April	8.1	6.3	11.3
May	6.8	5.6	9.5
June	12.2	7.6	7.3
July	7.5	4.4	5.0
August	11.9	6.2	5.9
September	8.1	10.6	11.7
October	7.9	13.3	10.2
November	9.1	12.5	9.4
December	10.4	14.0	6.5

Source: Advertising Checking Bureau,
Newspaper Advertising Bureau, Inc.

CONSUMER PRICE INDEX

While the consumer price index for men's wear rose 1.9% in 1984, the CPI for suits, sportcoats and jackets rose only 1.7% that of coats and jackets actually declined 0.2%. This compares favorable with the 4.3% rise which was registered overall during the year.

Between August 1984 and August 1985, however, the producer rice index for men's coats and jackets rose 2.5% while that of suits, sportcoats and jackets was off 5.2%. Overall the consumer price level as measured by the CPI rose 3.0% during this period.

Consumer Price Indexes for Selected Men's Apparel Items
(12/77 = 100, unless otherwise noted)

	August Average			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All items*	319.6	310.3	+ 3.0%	311.1	298.4	+ 4.3%
Apparel less footwear*	187.0	200.8	- 6.9	183.2	180.8	+ 1.3
Men's wear	125.2	122.1	+ 2.5	121.1	118.9	+ 1.9
Suits, sportcoats & jackets	108.1	114.0	- 5.2	112.8	110.9	+ 1.7
Coats & jackets	103.5	102.4	+ 1.1	101.2	101.4	- 0.2

* 1967 = 100.

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

The following information on purchases of men's tailored clothing and rainwear for the year 1984 comes from the Newspaper Advertising Bureau and is based on data from MRCA Information Services, of Stamford Connecticut. The data is based on findings from an ongoing panel of consumers who track the purchases of 11,500 nationally representative families.

Price Line

Percent of Men's Tailored Clothing Purchased by Price Line, 1984

	Overcoats & Topcoats	Raincoats & All Weather Coats	Suits	Sportcoats & Blazers
Under $25	9.7%	31.4%	1.4%	6.7%
$25.00 - $49.99	20.1	16.1	6.6	25.3
$50.00 - $99.99	34.9	40.6	37.0	51.2
$100.00 - $149.99	17.0	6.3	24.8	11.4
$150.00 - $199.99	10.2	3.7	18.7	3.4
$200.00 & over	8.1	2.0	11.6	1.9
Total purchases	100.0	100.0	100.0	100.0

(continued)

Price Line (continued)

Percent of Men's Slacks Purchased By Price Line, 1984

	Slacks
Under $10.00	11.3%
$10.00 - $19.99	51.6
$20.00 - $29.99	28.1
$30.00 - $39.99	5.8
$40.00 - $49.99	1.7
$50.00 & over	1.5
Total purchases	100.0%

Source: MRCA Information Services, 1984,
derived from the 1986 Newspaper Advertising
Planbook.

By Store Type

The following data on purchases of men's slacks by type of outlet is from TRAC, a division of NFO Research. The data is based on a nationally representative panel of 30,000 households which are surveyed every two months as to their household purchases.

Men's Slacks Purchases By Store Type

	1984		1983	
	Sept./Oct.	Mar./Apr.	Sept./Oct.	Mar./Apr.
Department stores	30.4%	30.2%	27.7%	26.4%
Mass merchandisers (Sears, Penney, Ward)	25.8	23.3	25.7	25.1
Specialty Stores	16.1	17.2	19.1	17.2
Discounters/off-price outlets	17.3	19.6	17.8	17.7
All other outlets	10.4	9.7	9.6	13.1

Source: TRAC Division,
NFO Research, Inc.,
Toledo, Ohio.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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FACT FILE

Market Research Division
Fairchild Publications, New York

Department Store Sales

Including Selected Major Apparel Specialty Stores

FAIRCHILD FACT FILE

Prepared by
Market Research Division
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TABLE OF CONTENTS

Page

INTRODUCTION.. 1

SUMMARY OF AVAILABLE SALES FIGURES
DEPARTMENT STORES & LEADING APPAREL
SPECIALTY STORES, 1984 (BY REGION)..................................... 2

DEPARTMENT STORE VOLUME LEADERS
STORES WITH TOTAL SALES OF $100 MILLION OR MORE........................28
STORES WITH SALES OF $50 MILLION TO $99 MILLION........................33

SALES FIGURES FOR MAJOR NATIONAL/REGIONAL CHAINS........................34

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED
BY CONGLOMERATE CORPORATIONS..39

SCHEDULE OF ADDITIONAL FACT FILES.......................................45

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E.B. Gold, Manager
Fairchild Book Division

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INTRODUCTION

This report summarizes information on the number of stores operated and sales of traditional department stores, as well as larger apparel specialty stores. They are listed by region, state and city in the U.S. Sales figures are for the year of 1984 or its closest fiscal period. They are based on published figures or the best available trade sources, including the Fairchild trade newspapers, Dun & Bradstreet, the National Retail Merchants Association and other trade information.

A separate listing is included of department stores having a volume of $50 million or more (at the buying headquarter level) for which data is available. An additional list is included of the major national/regional chains selling apparel and general merchandise, and also a list of the traditional department stores and apparel stores operated by conglomerate corporations.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having combined sales of apparel and soft goods amounting to 20 percent or more of the total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radios and TV sets
2. A general line of apparel for the famiy
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of the total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, opening specialty store units, off-price outlets, etc., or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

Stores are also expanding their operations beyond the trading area of the headquarter store, and to a growing degree, are even opening stores in geographical regions different from the headquarters' location. The sales attributed to headquarter locations may, therefore, cover activities removed from the specific city or trading area in which they are listed in the Fact File. Data on branch store operations is included where available.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, can be reported. The current sales estimates may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Audrey S. Balchen, Director
Fairchild Market Research Division

SUMMARY OF AVAILABLE SALES FIGURES
DEPARTMENT STORES & LEADING APPAREL SPECIALTY STORES, 1984
BY REGION

NORTHEAST	APPROX. SALES (Millions of $)
CONNECTICUT	
Bridgeport	
Read's Department Stores (Allied Stores, New York, N.Y.) (6 stores: Conn. 5, N.Y. 1)	$ 100.0
Skydel's, Inc. (1 spec. store)	3.0
Greenwich	
D.W. Rogers, Inc. (1 spec. store)	3.5
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I. 1)	193.0
Sage-Allen & Co. (12 jr. dept. stores in Conn.) (Hartford store was renovated in 1984)	66.0
Middletown	
Shapiro's (1 spec. store)	6.0
MAINE	
Brunswick	
W.F. Senter Co. (1 jr. dept. store)	3.5
Damariscotta	
R.H. Reny, Inc. (13 jr. dept. stores in Maine)	10.0
Freeport	
L.L. Bean (Primarily a mail order business; one store with sales estimated at over $30 million)	250.0
Portland	
Porteous Mitchell & Braun Co. (7 dept. stores: Me. 6, N.H. 1, plus 2 Downeast shops)	40.0
MASSACHUSETTS	
Attleboro	
London's, Inc. (5 spec. outlets)	6.0+
Boston Area	
Filene's (Federated Department Stores, Cincinnati, Oh.) (15 department stores: Mass. 10, N.H. 2, Me. 1, R.I. 1, Conn. 1) (Filene's opened a store in Albany, N.Y. in 1985)	328.4
Filene's Basement, Wellesley (Federated) (14 stores: Conn. 1, Ma. 10, N.Y. 3) (Stores in Paramus, N.J., Warwick, R.I., and Scarsdale, N.Y. were opened in 1985.)	188.8
Jordan Marsh (Allied Stores, New York, N.Y.) (17 dept. stores: Ct. 1, Ma. 12, Me. 1, N.H. 2, R.I. 1) (A store in Albany, N.Y. was opened in 1985; a Nashua, N.H. store will be opened in the Summer of 1986).	520.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) Copley Place	20.0
Sara Frederick's (10 specialty stores; acquired by Hutzler Bros. Co., Baltimore, Md., in October 1984).	15.0

DEPARTMENT/SPECIALTY STORES

NORTHEAST	APPROX. SALES (Millions of $)
MASSACHUSETTS	
Pittsfield	
England Brothers, Inc. (3 Mass. jr. dept. stores)	$ 11.0
Salem	
Jerry's Dept. Stores, Inc. (Operated Jerry's Dept. Stores and Rich's Dept. Stores (16) in Me., Ma., N.H.)	60.0
Springfield	
Albert Steiger, Inc. (9 dept. stores: Mass. 8, Conn. 1)	55.0
Topsfield	
Empire Clothing Co. (19 spec. stores in Ma. & Me.)	17.0
Waltham	
Grover Cronin, Inc. (1 jr. dept. store)	13.0
NEW HAMPSHIRE	
Laconia	
O'Shea's Dept. Store (1 jr. dept. store)	5.0
NEW JERSEY	
Lakewood	
Reynolds Bros., Inc. (5 spec. stores in N.J.)	8.0
Newark	
Bamberger's (R.H. Macy & Co., New York, N.Y.) (23 dept. stores: N.J. 14, Pa. 5, N.Y. 1, Del. 1, Md. 2. Also Furniture Clearance Centers) (Bamberger's will open 2 more stores in the Baltimore, Md. area in 1986; in 1987, they will open stores in Hamilton Township, N.Y. and in Tyson's Corner, Va.)	1,128.0
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (8 dept. stores in N.J.)	120.0
Ocean City	
Stainton's Department Store (1 dept. store)	6.5
Paramus	
Stern's (Allied Stores, New York, N.Y.) (17 dept. stores: N.Y. 10, N.J. 7)	390.0
Paterson	
Jacobs Department Store (1 dept. store)	10.0
Meyer Brothers (2 N.J. dept. stores)	4.5
Ridgewood	
Sealfons (Brooks Sealfons, Inc., Summit, N.J.) (1 spec. store)	7.0
Trenton	
S.P. Dunham & Co. (United Dept. Stores, Newark, N.J.) (4 spec. stores in N.J. and Pa.)	23.0

DEPARTMENT/SPECIALTY STORES

NORTHEAST

NEW YORK

	APPROX. SALES (Millions of $)
Amherst	
Jenss Dept. Stores (4 N.Y. dept. stores)	$ 15.0
Binghamton	
Boscov's (Boscov's, Reading, Pa.)(1 dept. store opened in 1984)	29.0
Buffalo	
Adam, Meldrum & Anderson (10 dept. stores in N.Y.)	110.0
L.L. Berger, Inc. (7 spec. stores in N.Y.)	17.0
The Sample, Inc. (10 spec. stores in N.Y.)	22.0
Cohoes	
Cohoes Spec. Stores (4 N.Y. spec. stores)	35.0
Elmira	
S.F. Iszard Co., Inc. (12 jr. dept. stores in N.Y.)	12.0
Rosenbaum's of Elmira, Inc. (3 spec. stores in N.Y.)	4.0
Gloversville	
Argensinger's Dept. Store, Inc. (2 gen. mdse. stores, 10 spec. stores in N.Y.)	8.0
Jamestown	
Jamestown-Bigelow Co. (1 dept. store. Also operates 2 spec. stores)	4.0
Kingston	
Britts Dept. Store Corp. (Harjack-Kingston Inc.) (1 dept. store)	6.5
Latham	
Interstate Department Stores Inc. (Toys "R" Us, Rochelle Park, N.J.) (Central buying for 2 Boston stores in Latham & Schenectady, N.Y.; 2 The Fair Stores, Flint & Burton, Mich.)	40.0
Liberty	
Sullivan Dept. Stores (2 N.Y. jr. dept. stores)	15.0
New York City Area	
Abraham & Straus, Brooklyn (Federated Dept. Stores, Cincinnati, Oh.) (15 dept. stores: N.Y. 9, N.J. 4, Pa. 2)	781.0
Alexander's Dept. Stores, Inc. (15 discount spec. stores: Conn. 1, N.J. 2, N.Y. 12)	520.0
(Announced plans in Dec. 1985 to close its flagship store in New York City as part of a redevelopment of the site; the earliest the store will be closed would be Christmas 1986).	
B. Altman & Co. (The Altman Foundation has an agreement in principle with developers/real estate investors plus Hutzlers, Baltimore, Md., who would acquire Altman's)	240.0
Flagship store, Fifth Avenue	110.0
Barney's (1 N.Y. spec. store)	65.0
(Will open a separate women's store in June 1986 which is expected to reach a volume of $20 million in its first year).	
Henri Bendel (1 spec. store) (Sales include $8.0 million in mail orders)	26.0
(Acquired by The Limited, Inc. in Oct. 1985)	
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Ca.) (1 New York City spec. store)	60.0

(New York City Area continued)

DEPARTMENT/SPECIALTY STORES

NORTHEAST

NEW YORK

New York City Area

	APPROX. SALES (Millions of $)
Bloomingdale's (Federated Dept. Stores, Cincinnati, Oh.) (14 dept. stores plus the home store Chestnut Hill, Mass.; Conn. 1, Fla. 1, Md. 1, Mass. 1, N.J. 2, N.Y. 4, Pa. 2, Tx. 1, Va. 1)	$ 903.0
Paramus (largest branch store)	60.0
Valley View Center, Dallas	50.0
(A store in The Falls, Fla. was opened in August 1985. The N.Y. flagship store is undergoing a 3-year renovation program and the White Flint, Kensington, Md. store is to be remodeled.)	
Bonwit Teller (Allied Stores, New York, N.Y.) (15 spec. stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Mo. 1, Fla. 2, Ca. 2)	140.0
(The Country Club Plaza, Kansas City, Mo. store was opened in November 1984 and was expected to reach a volume of $12 million in its first full year)	
Gimbels-East (Batus Inc., New York, N.Y.) (20 stores: N.Y. 8, Conn. 1, N.J. 3, Pa. 8)	475.0
New York Area	300.0
Philadelphia & Southern N.J. (9 stores)	175.0
Lord & Taylor (Associated Dry Goods Corp., New York, N.Y.) (41 stores: Conn. 2, D.C. 1, Fla. 5, Ga. 1, Ill. 7, Md. 1, Mass. 3, Mich. 4, N.J. 2, N.Y. 5, Pa. 2, Tex. 6, Va. 2)	695.0
(In October 1985, L&T opened a store in the Miami International Mall and in Boynton Beach, Fla. Each of these is expected to reach a volume of $20 million in 5 years. In 1986, stores will be opened in Boca Raton and in Dadeland, Fla.)	
Macy's New York (R.H. Macy, New York, N.Y.)(21 dept. stores: N.Y. 14, Conn. 2, Fla. 1, Tex. 4, plus furniture clearance centers	1,290.0
Herald Square flagship	380.0
Adventura Mall, North Miami, Fla.	60.0
(Macy's opened its 3rd Houston store (Baybrook Mall) in July 1985; a 4th, in the Houston Galleria, will be opened in the Fall, 1986. Macy's 1st Dallas store (Galleria) was opened in October 1985)	
Mays (J.W. Mays Inc., Brooklyn, N.Y.) (4 dept. stores in N.Y.)	84.7
Ohrbach's (AMCENA Corp., New York, N.Y.) (12 spec. stores: Ca. 6, N.J. 3, N.Y. 3)	200.0
Saks Fifth Avenue (Batus Inc., New York, N.Y.) (43 spec. stores: Ar. 1, Ca. 9, Conn. 1, Fla. 5, Ga. 1, Ill. 3, La. 1, Md. 1, Mass. 1, Mich. 3, Mo. 2, Nev. 1, N.J. 2, N.Y. 4, Oh. 3, Pa. 2, Tex. 3)	875.0
Flagship store, New York	183.0
Chicago	31.0
San Francisco	35.0
Southern California (6 stores)	95.0
Beverly Hills	32.0
(Saks Fifth Avenue opened stores in Owings Mills, Md., Boca Raton, Fla. and North Star Mall, San Antonio, Tex., in 1985. A Palm Springs, Ca. replacement store was opened in November 1985. A Denver, Co. store opening is planned.)	

(The Limited opened its first N.Y.C. store, on Madison Avenue, November 1985. This location encompasses 3 separate divisions: The Limited Stores, Limited Express and Victoria's Secret, each merchandised independently. The composite volume is expected to reach $10 million in the first year of operation.)

DEPARTMENT/SPECIALTY STORES

NORTHEAST

NEW YORK

	APPROX. SALES (Millions of $)
Niagara Falls	
Beir Bros. Inc., Rainbow Center (1 spec. store)	$ 8.0
Olean	
Bradner's, Inc. (1 gen. mdse. store)	3.5
Oneonta	
Bresee's Oneonta Dept. Store (1 dept. store)	6.0
Patchogue	
Swezey & Newings, Inc. (3 N.Y. dept. stores)	21.0
Rochester	
B. Forman & Co. (McCurdy & Co., Rochester) (8 N.Y. spec. stores)	20.0
McCurdy & Co. (7 N.Y. dept. stores)	58.0
Sibley, Lindsay & Curr (Associated Dry Goods, New York, N.Y.) (14 N.Y. dept. stores)	180.0
Schenectady	
The Carl Co. (7 N.Y. dept. stores)	30.0
Seaford	
Mid-Island Department Stores (7 L.I. spec. stores)	30.0
Syracuse	
The Addis Co. (4 N.Y. spec. stores)	11.0
Chappell's Dept. Store (7 N.Y. spec. stores)	30.0
Dey's (Allied Stores Corp., New York, N.Y.) (4 N.Y. spec. stores)	48.0
Hess's, Allentown, Pa., opened 2 stores--in Camillus Plaza Mall and Fayetteville Mall in August 1984. A combined volume of $20 million was expected in the first year of operation.	
White Plains	
Howland-Steinbach (Supermarkets General, Woodbridge, N.J.) (19 Howland's stores: Conn. 6, Mass. 1, N.H. 1, N.Y. 11; 10 Steinbach's in N.J.)	182.5
(The Hochschild part of this operation was discontinued in 1984--1 store, Reistertown Plaza, Baltimore, was closed, and the other 3 Baltimore stores were sold to Hutzler's)	

PENNSYLVANIA

	APPROX. SALES (Millions of $)
Allentown	
Hess's Department Stores, Inc. (Crown American Corp., Johnstown, Pa.) (32 dept. stores plus 3 franchise operations: Md. 1, N.Y. 5, Pa. 26)	273.6
(Hess's acquired 8 Rices Nachmans units from Phillips-Van Heusen in 1985--5 of which were reopened immediately and expected to reach a total volume of $22 million in the first year. A Pembroke Mall, Virginia Beach store will be opened in the Spring of 1986. Plans were also reported for Hess's to acquire Maloney Enterprises, a privately-held discount dept. store chain with a volume of $80 million in 1985)	

DEPARTMENT/SPECIALTY STORES

NORTHEAST

PENNSYLVANIA

	APPROX. SALES (Millions of $)
Aston	
The Dry Goods (SCOA Industries, Columbus, Ohio) (7 gen. mdse. stores: Del. 3, N.J. 2, Pa. 2)	$ 100.0
Easton	
Horn's Fashion Inc. (4 Pa. specialty stores)	3.0
Orr's Dept. Store (5 gen. mdse. stores: N.J. 3, Pa. 2)	15.0
Harrisburg	
Pomeroy's, Inc. (Allied Stores, New York, N.Y.) (5 Pa. dept. stores, not including 8 stores operated out of Levittown, Pa.) Pomeroy's also operates 2 former Troutman stores acquired in 1985--in Greensburg, Pa., and in Coventry Mall near Pottstown.	50.0
Havertown	
Weinberg's, Inc. (2 spec. stores)	4.0
Hazelton	
P. Deisroth's Sons (2 Pa. dept. stores)	6.0
Indiana	
Brody Bros. Inc. (3 Pa. spec. stores)	5.0
Johnstown	
Glosser Bros. (1 dept. store)	11.0
Lancaster	
Watt & Shand (2 Pa. dept. stores)	28.0
Levittown	
Pomeroy's, Inc. (Allied Stores, New York, N.Y.) (8 dept. stores: Del. 1, N.J. 1, Pa. 6)	80.0
Lewistown	
Dank's & Co. (4 gen. mdse. stores in Pa.)	7.0
Philadelphia	
Gimbels (Gimbels-East, New York, N.Y.) (9 dept. stores serving Philadelphia and southern N.J.)	175.0
Nan Duskin Specialty Stores (Philadelphia and Pittsburgh)	12.0
Strawbridge & Clothier (Operates department stores and Clover Stores--20 discount variety stores with a volume of $250 million)	630.5
Department stores (12 stores: Del. 2, N.J. 3, Pa. 7)	380.5
John Wanamaker (Carter Hawley Hale, Los Angeles, Ca.) (16 stores incl. The Globe (Cleland-Simpson), Scranton; other stores: Del. 1, N.J. 2, N.Y. 1, Pa. 11)	430.0

DEPARTMENT/SPECIALTY STORES

	APPROX. SALES (Millions of $)
NORTHEAST	
PENNSYLVANIA	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. dept. stores)	$ 165.0
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (13 dept. stores: Oh. 3, Pa. 10)	185.0
Kaufmann's Department Stores (May Department Store Co., St. Louis, Mo.) (11 dept. stores: Oh. 2, Pa. 8, W.Va. 1)	327.4
Reading	
Boscov's Dept. Stores, Inc. (10 dept. stores: Del. 1, N.Y. 1, Pa. 8)	221.0
Boscov's East, Reading (Enlarged in 1985 and expected to reach a volume of $25 million in 1985)	21.0
Wilkes Barre store	32.0
(Boscov's opened a store in Camp Hill Shopping Mall, Harrisburg, Pa., in September 1985)	
Scranton	
The Globe (Cleland-Simpson Co.) (Owned by John Wanamaker, Philadelphia, Pa.) (1 dept. store)	20.0
State College	
O.W. Houts & Son, Inc. (1 gen. mdse. store)	6.5
Uniontown	
Metzler's Dept. Store (2 gen. mdse. stores in Pa.)	5.0
Warren	
Levinson Bros. (2 gen. mdse. stores in Pa.)	5.0
York	
S. Grumbacher & Sons, Inc. (18 jr. dept. stores in Ind., Md. Oh., Pa., W.Va., operated under various names)	50.0
VERMONT	
St. Johnsbury	
Hovey's Shop, Inc. (2 gen. mdse. stores: N.H. 1, Vt. 1; also a spec. apparel store and a shoe store)	5.0
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington, Inc. (2 spec. stores in Ill.)	5.0
Champaign	
Robeson's, Inc. (1 jr. dept. store)	8.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

ILLINOIS

Chicago Area

	APPROX. SALES (Millions of $)
Carson Pirie Scott & Co. (dept. & spec. stores)	
Retail group total	$ 593.8
Dept. stores (21 stores: Ill. 18, Ind. 3	369.0
(County Seat spec. chain acquired from SuperValu, Hopkins, Mn. in May 1984, and CPS Direct Marketing acquired from MacDonald's in 1984. The former was reported to have an annual rate of sales amounting to $200 million in 1984, the latter, $100 million)	
(Carson Pirie Scott closed 3 stores in Jan. 1985: Peoria, Kewanee and Ottawa, Ill. Randhurst and Yorktown stores were renovated in 1984, Evergreen in 1985)	
(Carson Pirie Scott completed the sale and leaseback of 6 of its suburban Chicago stores in Nov. 1985 with Six Anchors Ltd. Partnerships, a Towson, Md. real estate concern; the stores will continue to operate as in the past.)	
Crawford Dept. Stores (3 gen. mdse. stores in Ill.)	14.0
Goldblatt Bros., Inc. (7 dept. stores in Chicago area)	35.0
Lytton's (Spec. stores: 9 of 12 stores have been closed, but the decision to close the State St. flagship stores, which had a 1983 volume of $10.8 million, has been changed)	25.0
Main Street (Federated Department Stores Inc., Cincinnati, Oh.) 3 Chicago stores opened in Fall 1984.	9.8
(7 additional stores are to be opened in the Chicago area)	
Marshall Field (Batus Inc., New York, N.Y.) (21 dept. stores: Ill. 17, Tex. 3, Wis. 1)	750.0
Meyer Bros. Dept. Store (1 dept. store)	5.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.)	31.0
Charles A. Stevens (26 spec. stores)	70.0
Wieboldt Stores, Inc. (13 Chicago area dept. stores) (Attempted acquisition by WSI Acquisition Corp., in October 1985)	191.2

Columbia

Brittany, Ltd. (4 spec. stores)	8.0
Weilbacher's, Inc. (1 gen. mdse. store)	4.0

Elgin

Ackemann Bros., Inc. (3 gen. mdse. stores)	5.0
Joseph C. Spiess Co. (4 dept. stores)	15.0

Granite City

The Glik Co., Inc. (9 family clothing stores)	10.0
(Also operates 4 women's spec. stores and 2 men's spec. stores)	

Peoria

P.A. Bergner & Co. (25 dept. stores: Ill. 22, Wis. 3)	220.0
(Bergner's headquarters were shifted to Milwaukee, Wis. in March 1985. The Peoria store was closed in January 1985. Bergner bought the Boston Store Div.--8 stores--from Federated in January 1985. See Milwaukee)	

(May Department Stores Co., St. Louis, Mo., opened a Peoria store in 1985)

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
ILLINOIS	
River Forest	
Madigan's (5 spec. stores)	$ 27.0
Rock Island	
McCabe's (1 gen. mdse. store)	4.0
St. Charles	
Colson's (2 spec. stores)	4.0
Tinley Park	
Gately's People's Store (1 jr. dept. store)	12.0
Waukegan	
Globe Dept. Stores (5 gen. mdse. stores)	7.0
INDIANA	
Elkhart	
Ziesel Dept. Stores (2 gen. mdse. stores)	5.0
Indianapolis	
L.S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (18 dept. stores: Ind. 13, Ky. 1, Oh. 4) (Merged with H. & S. Pogue, Cincinnati, Oh.--5 stores--in November 1984. ADG has announced plans to merge its 7-store Stewart Dry Goods Div., Louisville, Ky., into Ayres effective January 1986)	329.0
William H. Block & Co. (Allied Stores Corp., New York, N.Y.) (11 Ind. dept. stores) (The Edw. Wren stores (2) were merged into Block's in 1984)	90.0
(Giddings Jenny, Cincinnati, Ohio spec. store operation opened its first branch store in Indianapolis in 1984. It is expected to reach an annual volume of $5.5 million in its 1st full year.)	
Lafayette	
Loeb's Inc. (4 gen. mdse. stores: Ind. 3, Ill. 1)	7.0
Muncie	
Ball Stores, Inc. (2 gen. mdse. stores, 1 spec. store in Ind.)	8.0
South Bend	
Deitch-Corson (3 gen. mdse. stores in Ind.)	15.0
Terre Haute	
Root Dry Goods (Mercantile Stores, New York, N.Y.) (1 dept. store)	10.0
Schultz & Co. (1 gen. mdse. store)	5.0
Valparaiso	
J. Lowenstine & Sons, Inc. (1 jr. dept. store)	5.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

	APPROX. SALES (Millions of $)
IOWA	
Cedar Rapids	
Armstrong's (2 Ia. dept. stores)	$ 22.0
Davenport	
Peterson-Harned-Von Maur, Inc. (9 dept. stores: Ill. 1, Ia. 8)	55.0
Des Moines	
Younkers, Inc. (Equitable of Iowa Companies, Des Moines, Ia.) (29 dept. stores: Ill. 1, Ia. 24, Mn. 1, Neb. 2, S.D. 1) (Ottumwa, Ia. store was closed in January 1985.	188.6
KANSAS	
Coffeyville	
Read's, Inc. (3 spec. stores: Kans. 1, Okla. 2)	4.0
Fort Scott	
Litwin's Inc. (20 spec. stores in Kans. & Okla.)	15.0
Hutchinson	
D.G. Calhoun, Inc. (Kruger's Co.) (13 spec. stores)	10.0
Kansas City (See MISSOURI)	
Wichita	
Henry's (4 Kans. spec. stores)	14.0
MICHIGAN	
Detroit	
Crowley Milner (9 Mich. dept. stores) (Acquired by Oakland Holding Co. in 1985) (Will open a replacement downtown store in New Center, Detroit in May 1986. A store in Southfield, Mich. was opened in October 1985; a Burton Mich. store will be opened in March 1986)	92.9
Hudson's--see Dayton Hudson, Minneapolis, Minn.	
Grand Rapids	
Herp's (7 Mich dept. stores) (Allied Stores Corp., New York)	16.0
Paul Steketee & Sons (6 Mich. gen. mdse. stores)	30.0
Jackson	
Jacobson Stores Inc. (20 dept. stores: Fla. 9, Mich. 10, Ohio 1) (Opened a store in Tampa, Fla. in March 1985)	240.7
Kalamazoo	
Gilmore Brothers, Inc. (4 gen. mdse. stores in Mich.)	12.0
Saginaw	
W.C. Wiechmann Co. (3 Mich. gen. mdse. stores)	10.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
MINNESOTA	
Duluth	
Duluth Glass Block Stores Co. (Mercantile Stores, New York, N.Y.) (1 dept. store)	$ 22.0
Mankato	
Bretts Dept. Stores (5 Minn. jr. dept. stores)	12.0
Minneapolis	
Dayton Hudson Dept. Store Co. (36 stores in Mich., Minn., N.D., S.D., Wis.)	1,396.3
Donaldson's (Allied Stores, New York, N.Y.) (9 stores: Ia. 2, Minn. 7)	120.0
City Center	23.0
Harold's (1 spec. store)	8.0
J.C. Penney (1 store)	10.0
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 Minn. dept. stores. Acquired by Allied Stores in June 1985. The branch stores are to be merged with Donaldson's the flagship store in Minneapolis is to be sold.)	50.0
Nicollet Mall store	8.0
Redwood Falls	
Ehler's Retail Services (16 Minn. spec. stores)	12.0
St. Cloud	
The Fandel Co. (1 jr. dept. store plus 3 Intrigue spec. stores in Minn.)	6.0
G.R. Herberger's Inc. (25 dept. stores: Minn. 9, Mont. 3, Neb. 3, N.D. 4, S.D. 2, Wis. 3, Wyo. 1)	75.0
MISSOURI	
Joplin	
Newman's (6 spec. stores: Kans. 2, Mo. 2, Okla. 2)	25.0
Kansas City	
Halls Merchandising, Inc. (Hallmark Cards, Inc., Kansas City) (3 K.C. dept. stores)	35.0
Jack Henry Clothing (5 Mo. spec. stores)	14.0
The Jones Store Co. (Mercantile Stores, New York, N.Y.) (7 Mo. dept. stores)	170.0
Macy's (17 stores: Kans. 6, Mo. 6, Oh. 5. Consolidated with Davison's, Atlanta in February 1985 to form Macy's Atlanta) (The Bowling Green, Ohio store was closed February 1985; 3 stores in Toledo, 1 in Findlay plus a Toledo warehouse store were sold in July 1985 to Elder Beerman Stores Corp.)	240.0
Perryville	
Rozier Mercantile Co., Inc. (4 spec. stores)	6.0
St. Joseph	
The Paris (15 spec. stores)	9.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
MISSOURI	
St. Louis	
Dillard Dept. Stores, St. Louis Div. (Stix was acquired by Dillard Dept. Stores, Little Rock, Ark. in January 1984 including 11 stores: Ill. 1, Ka. 1, Mo. 9. The downtown store was closed for remodeling, then reopened in August 1985. Sales for the first year in this store are planned at $20 million. Sales for Stix, Baer & Fuller prior to the sale were at an annual rate of about $150 million)	$ 150.0
Famous-Barr Co. (May Dept. Stores Co., St. Louis, Mo.) (16 dept. stores: Mo. 13, Ill. 3)	450.9
Downtown St. Louis store (remodeling completed in 1985)	54.0
(St. Louis Centre and Peoria stores were opened in 1985)	
Springfield	
Heer's Inc. (Allied Stores, New York, N.Y. (2 dept. stores)	15.0
NEBRASKA	
Freemont	
George Schweser's & Sons (14 Neb. gen. mdse. stores)	8.0
Lincoln	
Miller & Paine Inc. (3 Neb. dept. stores)	10.0
Omaha	
J.L. Brandeis & Sons (10 dept. stores: Ia. 2, Neb. 8)	95.0
Philips Stores, Inc. (6 gen. mdse. stores: Ia. 2, Neb. 4)	12.0
Richman-Gordman Stores, Inc. (12 gen. mdse. stores: Ia. 4, Kans. 2, Nev. 6)	150.0
NORTH DAKOTA	
Fargo	
deLendrecie's, West Acres Shopping Center (Mercantile Stores Co., New York, N.Y.) (1 gen. mdse. store)	16.0
Grand Forks	
Mandel's (6 N.D. spec. stores)	5.0
OHIO	
Akron	
The M. O'Neil Co. (May Department Stores, St. Louis, Mo.) (10 Ohio dept. stores)	165.8
Ashtabula	
Carlisle's (9 dept. stores: Oh. 5, Pa. 4)	50.0
Bowling Green	
Fred W. Uhlman & Co. (15 spec. stores: Ind. 1, Ohio 14)	20.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

OHIO

	APPROX. SALES (Millions of $)
Cincinnati	
Giddings Jenny (2 spec. stores: Ind. 1, Oh. 1)	$ 12.0
McAlpin Co. (Mercantile Stores, New York, N.Y. (7 stores: Oh. 6, Ky. 1)	280.0
Shillito Rikes (Federated Department Stores, Cincinnati, Oh.) (14 dept. stores: Oh. 10, Ky. 4)	381.1
(Saks Fifth Avenue, New York, opened a store in Cincinnati in March 1984 which was expected to reach an annual rate of $15 million in its first year)	
Cleveland	
The Higbee Co. (11 dept. stores in Ohio plus a budget store and a homefurnishings store)	263.9
The May Co.-Cleveland (May Department Stores, St. Louis, Mo.) (10 dept. stores in Oh.)	229.7
Columbus	
F. & R. Lazarus (Federated Deptartment Stores, Cincinnati, Oh.) (17 dept. stores: Ind. 5, Oh. 11, W. Va. 1)	453.4
Dayton	
The Elder Beerman Store Corp. (20 dept. stores in Oh. & Ind. plus 2 furniture stores and clearance centers)	238.0
(In July 1985, Elder-Beerman bought 4 Ohio department stores from Macy's Atlanta Div.--3 in Toledo, 1 in Findlay)	
East Liverpool	
The New Ogilvie's (D.M. Ogilvie & Co.) (1 dept. store)	4.0
North Canton	
J.A. Conley Co. (12 gen. mdse. stores)	10.0
Portsmouth	
Marting's (2 jr. dept. stores in Oh.)	8.5
Toledo	
The Lion Dry Goods Co. (Mercantile Stores Co., Inc., New York N.Y.) (2 dept. stores, 1 home store, 1 fashion store)	100.0
Youngstown	
Strouss (May Department Stores, St. Louis, Mo.) (9 dept. stores: Oh. 7, Pa. 2)	92.6

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
WISCONSIN	
Brookfield	
T.A. Chapman Co. (7 gen. mdse. stores in Wis.)	12.0
Kohl's Department Stores (Batus Inc., New York, N.Y.) (33 dept. stores: Ill. 3, Ind. 6, Wis. 24)	245.0
Green Bay	
Prange's (H.C. Prange Co., Sheboygan, Wis.) (20 dept. stores)	$ 124.0
Madison	
Yost's Bros., Inc. (8 spec. stores)	6.5
Marinette	
Lauerman Bros. Co. (5 Wis. gen. mdse. stores)	6.0
Milwaukee	
Boston Stores (Acquired from Federated by P.A. Bergner, Milwaukee, in January 1985. 8 Wisc. dept. stores)	148.9
Milwaukee flagship store	30.0
Gimbels-Midwest (Batus Inc., N.Y., N.Y.)(9 dept. stores in Wis.)	200.0
Wisconsin Rapids	
Johnson Hills Dept. Stores (3 spec. stores)	10.0
SOUTH	
ALABAMA	
Birmingham	
Parisian Inc. (11 spec. stores in Ala.) (Parisian opened a store in Columbus, Ga. in November 1985. It will open an additional Birmingham, Ala. store in February 1986 in Hamilton Place Mall, and a Chattanooga, Tenn. store in the Fall of 1987)	167.0
Pizitz, Inc. (12 Ala. stores)	100.0
Florence	
Rogers, Inc.' (3 spec. stores)	9.0
Mobile	
C.J. Gayfer & Co., Inc., Springdale Plaza (Mercantile Stores, New York, N.Y. (11 dept. stores: Ala. 2, Fla. 6, Miss. 3)	300.0
Montgomery	
Gayfers/Montgomery Fair (Mercantile Stores, New York, N.Y.) (6 dept. stores: Ala. 4, Ga. 2)	140.0
James Stores (8 spec. stores)	6.0
ARKANSAS	
El Dorado	
J.A. West Co. (15 jr. dept. stores in Ark., La., Mo., Okla., Tex.)	25.0
Fort Smith	
Boston Store Dry Goods Co. (6 jr. dept. stores in Ark., La., Tex., incl. 3 under the White House name, 2 Boston Stores, 1 Gus Mayer store)	34.0
Hunt Dry Goods Co. (8 gen. mdse. stores: Ark. 6, Okla. 1, Tex. 1)	12.0

DEPARTMENT/SPECIALTY STORES

SOUTH

	APPROX. SALES (Millions of $)
ARKANSAS	
Little Rock	
M. M. Cohn (12 spec. stores in Ark., Okla., Tenn.)	50.0+
Dillard Dept. Stores, Little Rock Div. (Dillard Dept. Stores, Inc., Little Rock, Ark.) (17 stores: Ark. 6, La. 4, Tenn. 4, Tex. 3)	277.0
Park Plaza	41.0
DISTRICT OF COLUMBIA	
Garfinckel's (Allied Stores, New York, N.Y.) (10 spec. stores: D.C. 2, Md. 3, Va. 5)	110.0
Flagship stores, Washington, D.C.	30.0+
Hecht's (May Department Stores Co., St. Louis, Mo.) (23 dept. stores: D.C. 1, Md. 16, Va. 6)	531.9
(The downtown Washington store was closed and headquarters were moved to a new store in the Metro Center which opened November 4, 1985. The 1st year volume for this store is expected to reach $50 million.)	
(The Hecht Co. will open a store at Owings Mill Town Center, Md., in August 1986 and in Glen Burnie, Md. in October 1986)	
Woodward & Lothrop (15 dept. stores: D.C. 1, Md. 10, Va. 4, plus a Clearance Store) (Acquired in 1984 by Taubman Holdings, a Detroit, Mich. developer)	451.3
Flagship store, downtown Washington D.C., (renovated in 1985)	55.0
FLORIDA	
Bradenton	
Beall's Dept. Stores, Inc. (28 spec. stores in Fla.)	75.0
Jacksonville	
Furchgott's of Florida (3 spec. stores)	25.0
May-Cohens (May Department Stores, St. Louis, Mo.) (6 Fla. dept. stores)	69.4
Miami-Palm Beach-Fort Lauderdale Area	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (28 dept. stores in Fla.)(Boynton Beach, Fla. store opened in 1985)	691.5
JByron's Department Stores (Jack Eckerd Corp., Clearwater, Fla.) (57 dept. stores in Fla.)	220.5
(It has been reported that JByron's will be sold to Amcena Corp., N.Y.)	
Jordan Marsh-Florida (Allied Stores, New York, N.Y.) 15 dept. stores in Fla.	260.0
(A Coral Springs, Fla. store was opened in 1985)	
Lord & Taylor (Lord & Taylor, New York, N.Y.) (5 Fla. stores)	
Adventura Mall	10.0
Fort Lauderdale Galleria	17.0
Cutler Ridge, South Miami	12.0
Coral Square and Palm Beach Mall	20.0
(2 stores, Miami International Mall in West Miami and Boynton Beach Mall, Palm Beach County, were opened in 1985. Each is expected to reach a volume of $20 million within 5 years.)	

(Other New York stores with operations in the Miami area include Bloomingdales, Saks Fifth Avenue and Macy's.)

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
FLORIDA	
Pensacola	
Great Day Family Stores (18 stores: Ala. 4, Fla. 14)	$ 5.0
Tampa-St. Petersburg	
Robinson's of Florida (Associated Dry Goods, New York, N.Y.) (7 dept. stores in Fla.) (A store was opened February 1985 in Fort Meyers; a replacement store was opened in Naples in the Fall of 1985. Three additional Fla. stores are scheduled for opening in 1986)	94.0
Maas Brothers, Inc. (Allied Stores, New York, N.Y.) (19 dept. stores in Fla.)	320.0
Winter Park	
Ivey's-Florida (Batus Inc., New York, N.Y.) (12 dept. stores in Fla.)	105.0
GEORGIA	
Atlanta	
Davison's (Macy's Atlanta) (14 dept. stores: Ga. 13, S.C. 1) (Macy's Midwest, Kansas City, was merged with Davison's in February 1985 and re-named Macy's Atlanta division. 4 Ohio stores plus a warehouse were sold to Elder Beerman in August 1985. Macy's Atlanta opened its 1st Alabama store, in Riverchase Galleria, in February 1985. A store in Atlanta and in New Orleans will be opened in 1986.)	350.0
H. Kessler & Co. (6 Ga. stores plus a wholesaling operation)	14.0
Rich's (Federated Dept. Stores, Cincinnati, Oh.) (17 dept. stores: Ala. 2, Ga. 13, S.C. 2, plus Outlet Home Store, Atlanta) (A 14th Atlanta store, in Town Center, will be opened in 1986) (Rich's also operates 31 Richway Discount Stores which had a 1984 volume totaling $432 million.)	602.1
Sunshine Department Stores (6 gen. mdse. stores)	7.0
Augusta	
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (8 stores: Ga. 5, S.C. 3)	120.0
Columbus	
J.A. Kirvan Co. (3 spec. stores)	10.0
Kiralvy's (5 spec. stores)	5.0
Duluth	
Parson's, Inc. (3 gen. mdse. stores)	8.0
LaGrange	
Mansour's, Inc. (1 jr. dept. store)	7.0
Savannah	
Levy's of Savannah, Inc. (Allied Stores, New York, N.Y.) (2 spec. stores)	7.0

DEPARTMENT/SPECIALTY STORES

SOUTH

	APPROX. SALES (Millions of $)
KENTUCKY	
Ashland	
C.H. Parsons Co. (1 jr. dept. store)	$ 7.0
Lexington	
Embry & Co. (5 spec. stores)	
McAlpin Co. (Mercantile Stores Co., New York, N.Y. (2 jr. dept. stores)	20.0 20.0
Louisville	
J. Bacon & Son (Mercantile Stores, New York, N.Y. (6 dept. stores: Ind. 1, Ky. 5)	130.0
Behr Stores (34 spec. stores in Ala., Ar., Ga., Ky. N.C., S.C., Tenn.)	20.0
Lerman Bros., Inc. (20 spec. stores in Ind. and Ky.	10.0
Shapira Corp. (The Louisville Store/The People's Store/Town & Country) (19 spec. stores)	16.0
Snyders, Inc. (8 jr. dept. stores)	42.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 dept. stores: Ind. 1, Ky. 6) (To be merged with L.S. Ayres, Indianapolis, effective Jan. 2, 1986. The names of the stores may be changed to Ayres.)	75.0
Whitesburg	
Dawahares Dept. Stores, Inc. (2 Ky. dept. stores; also 16 spec. stores and 3 furniture stores)	38.0
LOUISIANA	
Alexandria	
Wellan's (3 gen. mdse. stores in La.) (Acquired Palais Royal, a three unit dept. store based in Shreveport, La. in December 1985; Palais Royal, with an estimated annual volume of $13 mil., will continue to operate as a separate entity.)	12.0
Baton Rouge	
Goudchaux/Maison Blanche, Inc. (The New Maison Blanche) (7 dept. stores in La.)	207.6
Lafayette	
Abdalla's Lafayette Inc. (2 spec. stores)	12.5
Lake Charles	
Many-Nicholson Dry Goods (10 gen. mdse. stores)	10.7
Muller Co., Ltd. (Allied Stores Corp., New York, N.Y.) (1 store)	7.0
Minden	
West & Co. of La., Inc. (25 gen. mdse. stores in Ala., Ark., La., Miss., Tex. plus 7 discount centers)	40.0
New Orleans	
The Leon Godchaux Clothing Co. (7 spec. stores plus 5 Kiddos stores in La., Miss.)	38.0
D.H. Holmes Co. (16 dept. stores: Ala. 1, La. 13, Miss. 2)	271.7
Krauss Co., Ltd. (1 dept. store)	23.0

DEPARTMENT/SPECIALTY STORES

SOUTH

	APPROX. SALES (Millions of $)
LOUISIANA	
Shreveport	
Rubenstein's, Inc. (4 jr. dept. stores in La.)	$ 11.0
MARYLAND	
Baltimore	
Brager-Gutman (2 gen. mdse. stores)	6.0
L. Epstein & Sons (8 jr. dept. stores in Md.)	32.0
Hutzler's (11 dept. stores including 4 Hochschild, Kohn stores in Greater Baltimore area which were acquired in 1984).	130.0
(A replacement Baltimore flagship store was opened by Hutzler's in April 1985, which is their 3rd largest store, after Townson, Md. and Westview, Md.)	
(In October 1984, Hutzler's acquired the Sara Fredericks (Boston) specialty chain with stores in Fla., Mass., N.Y. and an annual volume of $15 million. In September 1985, an agreement was reached to buy B. Altman Co. (New York) retail operations from an investor group which is handling the real estate operations involved in the sale of Altman's.)	
MISSISSIPPI	
Jackson	
McRae's, Inc. (14 dept. stores: Fla. 1, Miss. 13)	166.7
NORTH CAROLINA	
Charlotte	
Ivey's-Carolinas (Batus Inc., New York, N.Y.) (13 dept. stores: N.C. 12, S.C. 1)	120.0
Elkin	
Spainhour's Store (7 N.C. spec. stores)	6.5
Rocky Mount	
Baldwin Stores Corp. (11 stores in N.C.)	5.0
Whiteville	
Leder Bros. Dept. Stores (10 stores, including Leder-Potter Stores in N.C. and S.C.)	7.0
Winston-Salem	
Davis, Inc. (3 N.C. stores)	8.0
Mother & Daughter Stores (8 N.C. stores)	5.0
OKLAHOMA	
Checotah	
Sharpe Dept. Store (20 stores in Okla., including a Ben Franklin store)	8.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
OKLAHOMA	
Oklahoma City	
John A. Brown Co. (6 dept. stores in Okla. and Tex.)	$ 82.0
(Acquired by Dillard Department Stores Central Division, Fort Worth, Tex., in January 1985. Dillard's exchanged the Crossroad Shopping Center store for a Federated store, Bullock's, Christown Mall, Phoenix; 2 John A. Brown Oklahoma City stores were sold to Sanger-Harris. The Woodland Hills Mall, Tulsa, store was sold by Dillard to J.C. Penney Co. Dillard will operate under its name the former John A. Brown stores in Penn Square, Oklahoma City, and in Utica Square, Tulsa.)	
Langston Co. (3 spec. stores)	10.0
Tulsa	
Froug's Inc. (12 spec. stores: Ark. 1, Okla. 11)	20.0
Renberg's (4 spec. stores)	38.0
Sanger-Harris (Sanger-Harris, Dallas) (2 Tulsa dept. stores, incl. store opened in the Fall of 1984)	24.0
The Vandever Co., Southroad Mall (The Dunlap Co., Fort Worth, Tex.) (2 Okla. spec. stores)	11.0
SOUTH CAROLINA	
Anderson	
Gallant-Belk (Belk Stores Services, Inc., Charlotte, N.C.) (4 jr. dept. stores: Ga. 2, S.C. 2)	18.0
Charleston	
James F. Condon & Sons (1 dept. store)	6.0
Kerrison's Dept. Stores (3 S.C. dept. stores)	10.0
Columbia	
James L. Tapp Co. (4 S.C. spec. stores)	12.0
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (2 spec. S.C. stores)	22.0
Greenville	
Meyers-Arnold Co. (9 dept. stores: Ga. 2, N.C. 2, S.C. 5)	27.0
Myrtle Beach	
Chapin Co. (1 gen. mdse. store)	12.0
Spartanburg	
Belk-Hudson (Belk Stores Services, Inc., Charlotte, N.C.) (4 S.C. jr. dept. stores)	12.0
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (5 Tenn. depts. stores)	50.0
Chattanooga	
Loveman's (5 Tenn. dept. stores)	32.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
TENNESSEE	
Jackson	
Kisber's Dept. Store, Inc. (2 Tenn. spec. stores)	$ 6.0
Knoxville	
Millers (Allied Stores Corp., New York, N.Y.) 13 dept. stores: Ga. 1, Tenn. 11, Va. 1)	100.0
Ira A. Watson Co. (19 stores: Ala. 1, Ky. 9, Tenn. 4, Va. 2, W.Va. 3)	50.0
Madison	
McClure's Stores, Inc., Madison Square (3 Tenn. spec. stores)	10.0
Memphis	
Goldsmith's (Federated Department Stores, Cincinnati, Ohio) (6 dept. stores in Tenn.)	164.0
Nashville	
Cain-Sloan (Allied Stores Corp., New York, N.Y.) (4 Tenn. dept. stores)	60.0
The Castner Knott Dry Goods Co. (Mercantile Stores, New York, N.Y.) (11 dept. stores: Ala. 3, Ky. 1, Tenn. 7)	190.0
TEXAS	
Abilene	
Thornton's Dept. Stores, Inc. (P.N. Hirsch & Co., St. Louis, Mo.) (4 jr. dept. stores in Tex.)	11.0
Austin	
Scarbrough's (3 dept. stores in Tex.)	25.0
Beaumont	
The Fair, Inc. (23 spec. stores in Tex. and La.)	50.0
White House Co. (Boston Stores D.G. Co., Fort Smith, Ark.) (6 gen. mdse. stores: Ark. 2, La. 1, Tex. 3 Also operates Gus Mayer store in Beaumont, Tex.)	40.0
Dallas	
Bloomingdale's (Bloomingdale's, New York, N.Y.) Valley View Center	50.0
Dillard's, Valley Vino (Dillard's-San Antonio Div.) (Store enlarged)	50.0
Joske's-Dallas (Allied Stores, New York, N.Y.) (In 1985 Joske's-Dallas was made the headquarters for a consolidation involving Joske's-Dallas/Houston/San Antonio and comprising 27 stores)	430.0
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (21 spec. stores: Cal. 4, D.C. 1, Fla. 2, Ga. 1, Ill. 3, Mass. 1, Mo. 1, Nev. 1, N.Y. 1, Tex. 6)	620.0
3 Southern Ca. stores	91.0
(A store in Palo Alto, Ca. was opened in August 1985. It is expected to reach a volume of $20 million in its first year.)	

SOUTH

	APPROX. SALES (Millions of $)
TEXAS	
Dallas (continued)	
Sanger-Harris (Federated Department Stores, Cincinnati, Oh.) (16 dept. stores in Tex. and Okla. plus 2 Levy's, Tucson, Ariz. spec. stores)	$ 447.4
(Sanger-Harris acquired 2 Oklahoma City John A. Brown stores from Dillard Dept. Stores Co. in May 1985.)	
(Macy's New York opened a store in the Dallas Galleria in October 1985, which is expected to exceed $50 million in its first year.)	
El Paso	
The White House (The Dunlap Co., Forth Worth, Tex.) (2 spec. stores: Tex. 1, N.M. 1)	10.0
Fort Worth	
Dillard Dept. Stores, Fort Worth Div. (Dillard Dept. Stores, Inc. Little Rock, Ark.) (31 stores: Ka. 2, Mo. 1, Okla. 13, Tex. 15, including 4 former John A. Brown, Okla. City/Tulsa stores acquired in 1984)	375.0
The Dunlap Co. (operates 33 Tex. department and specialty stores under names of Stripling & Cox, Lintz, Hirsch Bros., White House, etc.)	125.0
Monnig's (16 department and specialty stores in Texas)	60.0
Pace, Newsom & Moates, Inc. (37 general mdse. stores in Texas)	40.0
Houston	
Craig Stores (16 spec. stores plus 5 Buelow Stores)	50.0
Foley's (Federated Dept. Stores, Cincinnati, Oh.) (16 dept. stores in Tex.) (Plans to open a Corpus Christi, Tex. store in Spring 1987)	682.4
(Macy's New York opened a 3rd Houston store, in Baybrook Mall, in July 1985; a 4th will be opened in Houston Galleria in the Fall of 1986.)	
(Sakowitz Inc. which had 15 spec. stores in Ariz., Tex., Okla., and had a volume of $190 million in 1983, filed for reorganization under Chapter 11 on August 1, 1985. Five stores are to to closed, including stores in Dallas; Scottsdale, Ariz.; Midland, Tex.; and 2 Houston stores. The Tulsa store was sold, leaving 4 Houston area stores and 2 boutiques.)	
Jacksonville	
White & Mays (55 gen. mdse. stores in Tex. and La.)	18.0
Lubbock	
Hemphill-Wells Co. (4 Tex. gen. mdse. stores)	32.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
TEXAS	
San Antonio	
Dillard Department Stores, San Antonio Division (Dillard Department Stores, Little Rock, Ark.) (22 stores: N.M. 3, Tex. 19)	$ 315.0
Frost Brothers (Manhattan Industries, New York, N.Y.) (12 spec. stores in Tex.)	126.0
LaFeria Dept. Store (6 jr. dept. stores in Tex.)	17.0
(Saks Fifth Ave. opened a store in the North Star Mall, San Antonio, in November 1985. Marshall Field will open a San Antonio store in November 1986 which is expected to reach a volume of $20 million in its first year.)	
Trinity	
Baskin's Dept. Stores, Inc. (4 gen. mdse. stores)	5.0
Waco	
R.E. Cox Co. (1 gen. mdse. store)	11.0
Goldstein-Migel, Inc. (1 spec. store)	5.0
Wichita Falls	
McClurkan's Dept. Store (2 gen. mdse. stores in Tex.)	10.0
VIRGINIA	
Arlington	
Morton's (6 spec. stores: D.C. 3, Md. 3)	10.0
Martinsville	
Globman's, Inc. (6 jr. dept. stores: N.C. & Va.)	14.0
Norfolk	
Hess's Rices Nachmans (formerly Rices Nachmans) (Sold by Phillips-Van Heusen Corp., New York, N.Y. to Hess's Department Stores, Inc. (Crown American) in February 1985, and 3 out of 8 stores were closed; 5 new stores were opened in February 1985 in Va.)	30.0
Smith & Welton, Inc. (8 jr. dept. stores in Va.)	18.0
Richmond	
Miller & Rhoads (Allied Stores Corp., New York, N.Y.) (22 dept. stores: N.C. 5, Va. 17) (A Roanoke store was opened in 1985)	130.0
Southern Dept. Stores, Inc. (4 gen. mdse. stores in Va.)	6.0
Thalhimer Bros., Inc. (Carter Hawley Hale Stores, Inc., Los Angeles, Ca.) (25 dept. stores: N.C. 9, S.C. 1, Tenn. 1, Va. 14) (Plans to open a store in Roanoke, Va., and in Charleston, S.C.)	315.0

DEPARTMENT/SPECIALTY STORES

	APPROX. SALES (Millions of $)
SOUTH	
WEST VIRGINIA	
Charleston	
A.W. Cox Dept. Store Co. (15 spec. stores: Ky. 5, Oh. 1, W.Va. 9)	$ 8.5
Parkersburg	
Dils Bros. & Co. (2 W.Va. dept. stores)	7.5
Wheeling	
Stone & Thomas, Inc. (15 dept. stores: W. Va. 15, Oh. 1)	100.0+
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (5 gen. mdse. stores in Ariz.)	22.0
Flagstaff	
Babbitt Bros. Trading Co. (10 gen. mdse. stores in Ariz.)	20.0
Mesa/Tempe/Scottsdale	
The Broadway-Southwest, Mesa (Carter Hawley Hale, Los Angeles, Ca.) (10 dept. stores: Ariz. 7, Nev. 2, N.M. 1)	165.0
Dillard Dept. Stores, Phoenix, Div. (Dillard Dept. Stores, Little Rock, Ark.) (12 dept. stores: Ariz. 9, Nev. 3)	160.0
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (9 dept. stores: Ariz. 7, Nev. 1, N.M. 1)	112.0
Tucson	
Levy's (Sanger-Harris Div. of Federated Dept. Stores, Cincinnati, Oh.) (2 Tucson spec. stores)	38.0
CALIFORNIA	
Bakersfield	
Brock's Dept. Store (2 dept. stores)	20.0
Carson	
The Boston Stores, Inc. (20 spec. stores: Ariz. 4, Calif. 16)	25.0
Eureka	
Daly's (4 spec. stores)	10.0
Fresno	
E. Gottschalk & Co. (9 dept. stores in Ca., incl. Fair. Also operates Bobbie West and Village East Specialty Stores)	106.0
Los Angeles/Long Beach Area	
Broadway-Southern California (Carter Hawley Hale, Los Angeles, Ca.) (40 dept. stores in Ca.) (2 stores were scheduled for 1985 openings in San Diego County in 1985 and a store is to be opened in the South Coast Plaza in 1986.)	945.0

DEPARTMENT/SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Los Angeles/Long Bear Area (continued)	
Buffum's Inc., Long Beach (David Jones Ca., Inc., Long Beach, Ca.) (14 jr. dept. stores, 4 spec. stores)	$ 115.0
Bullock's Southern California (Federated Dept. Stores, Cincinnati, Oh.) (22 dept. stores: Ariz. 2, Ca. 19, Nev. 1, 6 Bullock's Wilshire spec. stores in Ca.)	673.8
Bullock's (22 dept. stores)	594.0
(Bullock's Christown Mall, Phoenix, Ariz. store was exchanged by Federated in May 1985 for a John A. Brown store in Oklahoma City. This store, plus a 2nd Oklahoma City John A. Brown store, are to be operated by Sanger-Harris, Dallas.)	
I. Magnin (I. Magnin, San Francisco, Ca.) (10 Southern Ca. spec. stores)	102.0
May Co. California, North Hollywood (May Dept. Stores, St. Louis, Mo.) (34 Ca. dept. stores)	786.4
Laurel Plaza (became May Co. flagship store in 1984)	40.0
(Montebello, Ca. store opened in 1985. For 1986, stores are planned for Escondido in San Diego County and downtown Los Angeles.)	
Neiman-Marcus (Neiman Marcus, Dallas, Tex.) (3 Southern Ca. spec. stores)	91.0
Beverly Hills store	51.0
Nordstrom's (Nordstrom, Inc. Seattle, Wash.) (6 Southern Ca. spec. stores)	270.0
(Galleria at South Bay store, opened in March 1985, is expected to reach a volume of $40 million in its first year.)	
J.W. Robinson (Associated Dry Goods, New York, N.Y.) (21 Ca. depts. stores)	525.0
La Cumbre Plaza, Santa Barbara, Ca. (stores to be enlarged)	40.0
(San Diego, Ca., store opened in 1985; three stores will be opened in 1986: Escondido, Costa Mesa, Palm Desert)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (6 Southern Ca. spec. stores)	95.0
Beverly Hills	32.0
(Opened a Palm Springs replacement store in November 1985. Estimated first year volume of $10 million).	
Pacific Grove	
Holman's Dept. Store (1 store)	10.0
Sacramento	
Weinstock's (Carter Hawley Hale Stores, Inc., Los Angeles, Ca.) (12 dept. stores: Ca. 8, Nev. 1, Utah 3)	220.0
San Bernadino	
Harris (5 gen. mdse. stores in Ca.)	50.0
San Diego	
Walker Scott Co. (14 gen. mdse. stores in Ca.) (2 stores--in San Diego and in LaJolla--were closed in February 1985.)	40.0

(In August 1985, the Horton Plaza Mall, San Diego, was opened. The Nordstrom anchor is expected to reach a 1st year volume of $25- to $30 million, J.W. Robinson, $22 million. The opening of The Broadway has been delayed, but this store is expected to reach a sales volume of $15 million in its 1st year of operation.)

DEPARTMENT/SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
San Francisco/Oakland/Palo Alto	
Emporium Capwell (Carter Hawley Hale, Los Angeles, Ca.) (22 dept. stores in Ca.)	$ 660.0
Macy's California (R.H. Macy, New York, N.Y.) (25 dept. stores in Ca.)	1,135.0
(The Union Square flagship store is expected to have a volume of over $70 million in 1985. Stores in the Solano Mall (Fairfield) and in Corte Madera were opened in August 1985.)	
I. Magnin (Federated Dept. Stores, Cincinnati, Oh.) (26 spec. stores: Ariz. 1, Ca. 19, Ill. 3, Md. 1, Ore. 1, Wash. 1)	309.7
(A Sacramento, Calif. store was opened in August 1985.)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (1 spec. store in San Francisco)	30.0+
(A store in Palo Alto was opened in August 1985, which is expected to reach a volume of $20 million in its 1st full year.)	
Nordstrom (4 Northern Ca. spec. stores)	150.0
(A store at Stevens Creek will be opened in 1986.)	
Saks Fifth Ave. (Saks Fifth Ave., New York, N.Y.) (1 spec. store)	35.0
San Luis Obispo	
Riley's Dept. Store, Inc. (4 gen. mdse. stores in Ca.)	10.0
San Mateo	
Levy Bros. Dept. Stores (5 gen. mdse. stores in Ca.)	9.0
Santa Cruz	
Samuel Leask & Sons (3 gen. mdse. stores in Ca.)	9.0
Santa Monica	
H.C. Henshey Co. (2 gen. mdse. stores in Ca.)	10.0
Santa Rosa	
Rosenberg's (1 spec. store)	10.0
Watsonville	
Charles Ford Co. (5 dept. stores and 5 spec. stores in Ca.)	25.0
Whittier	
Hinshaw's Dept. Stores, Inc. (2 dept. stores in Ca.)	28.0
COLORADO	
Denver	
The Denver Dry Goods Co. (Associated Dry Goods, New York, N.Y.) (12 dept. stores in Colo.)	145.0
Joslin's, Englewood (Mercantile Stores, New York, N.Y.) (10 dept. stores: Col. 9, Wyo. 1)	165.0
May D & F (May Dept. Stores, Denver Colo.)(12 Colo. dept. stores)	177.6
Neusteter's (4 spec. stores in Colo.)	20.0

(The Broadway-Southwest will open 2 stores in 1985--Villa Italia and Cinderella City malls. A volume of $20 million each is expected on an annual basis.)

DEPARTMENT/SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
HAWAII	
Honolulu	
Liberty House (Amfac, Honolulu) (50 stores)	$ 207.5
IDAHO	
Boise	
LaMode, Ltd. (2 spec. stores)	8.0
OREGON	
Eugene	
Emporium Inc. (13 gen. mdse. stores: Ore. 12, Wash. 1)	55.0
Klamath Falls	
Miller's Dept. Store (Idaho Dept. Store Co., Caldwell, Id.) (1 dept. store)	13.5
Portland	
Meier & Frank (May Dept. Stores Co., St. Louis, Mo.) (7 dept. stores: Ore. 6, Wash. 1)	211.8
UTAH	
Salt Lake City	
Dahle's (20 spec. stores in Utah, Mont., Colo., Nev., Ca., Wyo.)	15.0
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (9 dept. stores: Id. 2, Ut. 7)	159.6
WASHINGTON	
Seattle/Everett/Spokane/Tacoma	
The Bon (Allied Stores, New York, N.Y.) (37 dept. stores plus a Seattle Home Store: Id. 7, Mont. 3, Ore. 6, Utah 3, Wash. 17, Wyo. 1)	470.0
Frederick & Nelson, Seattle (Batus Inc., New York, N.Y.) (15 dept. stores: Ore. 7, Wash. 8)	240.0

DEPARTMENT STORE VOLUME LEADERS

Following is a listing of leading traditional department stores, showing the buying or divisional headquarter location as of the end of 1984 and the best available information on sales for the year 1984 (or closest fiscal period) attributed to each headquarter operation. The volume figures cover sales of all stores (confined to department stores where possible) operated by the listed store. Not included in this compilation are national chains (such as Sears, Ward and Penny), promotional chains, and discount houses (see section on MAJOR NATIONAL/REGIONAL CHAINS).

STORES WITH TOTAL SALES OF $100 MILLION OR MORE

	SALES VOLUME (Millions of $)
Dayton Hudson Department Stores, Minneapolis, Minn. (Dayton Hudson Corp.) (36 stores)	1,396.3
Macy's New York, New York, N.Y. (R.H. Macy) (21 department stores plus 4 clearance centers)	1,290.0
Macy's California, San Francisco, Ca. (R.H. Macy) (25 department stores plus 2 clearance centers)	1,135.0
Bamberger's, Newark, N.J. (R.H. Macy) (23 department stores plus 3 furniture centers)	1,128.0
Broadway Southern California, Los Angeles, Ca. (Carter Hawley Hale) (40 stores)	945.0
Bloomingdales, New York, N.Y. (Federated) (14 stores)	903.0
May Co., California, Los Angeles, Ca. (May Department Stores) (34 stores)	786.4
Abraham & Straus, Brooklyn, N.Y. (Federated) (15 stores)	781.0
Marshall Field, Chicago, Ill. (Batus Inc.) (21 stores)	750.0
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (41 stores)	695.0
Burdine's, Miami, Fla. (Federated) (28 stores)	691.5
Foley's, Houston, Tex. (Federated) (16 stores)	682.4
Emporium Capwell, San Francisco, Ca. (Carter Hawley Hale) (22 stores)	660.0
Rich's, Inc., Atlanta, Ga. (Federated) (18 stores)	602.1
Bullock's, Los Angeles, Ca. (Federated) (22 department stores, not including Bullock's Wilshire spec. stores)	594.0
Hecht's, Washington, D.C. (May Department Stores) (23 stores)	531.9
J.W. Robinson Co., Los Angeles, Ca. (Associated Dry Goods) (21 stores)	525.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Jordan Marsh-New England, Boston, Mass. (Allied Stores) (17 stores)	$ 520.0
Gimbels-East, New York, N.Y. (Batus Inc.) (20 stores)	475.0
The Bon, Seattle, Wash. (Allied Stores) (37 stores plus Seattle Home Store)	470.0
F. & R. Lazarus, Columbus, Oh. (Federated) (17 stores)	453.4
Woodward & Lothrop, Inc., Washington, D.C. (15 stores)	451.3
Famous Barr, St. Louis, Mo. (May Department Stores) (16 stores)	450.9
Sanger-Harris, Dallas, Tex. (Federated) (18 stores)	447.4
Joske's-Dallas, Dallas, Tex. (Allied Stores) (27 stores--consolidation of Dallas, Houston, and San Antonio divisions)	430.0
Wanamaker's, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	430.0
Stern's, Paramus, N.J. (Allied Stores) (17 stores)	390.0
Shillito Rikes, Cincinnati, Oh. (Federated) (14 stores)	381.1
Strawbridge & Clothier, Philadelphia, Pa. (Allied Stores) (12 department stores)	380.5
Dillard's-Fort Worth Div., Fort Worth, Tex. (Dillard Dept. Stores) (31 stores)	375.0
Carson Pirie Scott & Co., Chicago, Ill. (21 stores in department store division)	369.0
Macy's Atlanta, Atlanta, Ga. (R.H. Macy) (26 stores)	350.0
L.S. Ayres, Indianapolis, Ind. (Associated Dry Goods) (18 stores)	329.0
Filene's, Boston, Mass. (Federated) (15 stores, not including separated Basement Division)	328.4
Kaufmann's, Pittsburgh, Pa. (May Department Stores) (11 stores)	327.4
Maas Bros., Tampa, Fla. (Allied Stores) (19 stores)	320.0
Dillard's-San Antonio Div., San Antonio, Tex. (Dillard Dept. Stores) (22 stores)	315.0
Thalhimer's, Richmond, Va. (25 stores)	315.0
C.J. Gayfer Co., Mobile, Ala. (Mercantile Stores) (11 stores)	300.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
McAlpin Co., Cincinnati, Oh. (Mercantile Stores) (7 stores)	$ 280.0
Dillard's-Little Rock Div., Little Rock, Ark. (Dillard Dept. Stores) (17 stores)	277.0
Hess's, Inc., Allentown, Pa. (Crown American Corp.) (32 stores)	273.6
D.H. Holmes Co., New Orleans, La. (16 stores)	271.7
Higbee's, Cleveland, Oh. (The Higbee Co.) (11 stores)	263.9
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (15 stores)	260.0
Kohl's Department Stores, Brookfield, Wis. (Batus Inc.) (34 stores)	245.0
Jacobson Stores, Jackson, Mich. (20 stores)	240.7
B. Altman, New York, N.Y. (Possible acquisition by Hutzler Bros.) (7 stores)	240.0
Frederick & Nelson, Seattle, Wash. (Batus Inc.) (15 stores)	240.0
Elder Beerman Stores Corp., Department Store Div., Dayton, Oh. (20 stores)	238.0
The May Co., Cleveland, Oh. (May Department Stores) (10 stores)	229.7
Boscov's Department Stores, Reading, Pa. (10 stores)	221.0
JByron's, Miami, Fla. (Jack Eckerd Corp.) (57 junior department stores)	220.5
P.A. Bergner, Peoria, Ill. (25 stores)	220.0
Weinstock's, Sacramento, Ca. (Carter Hawley Hale) (12 stores)	220.0
Meier & Frank, Portland, Ore. (May Department Stores) (7 stores)	211.8
Goudchaux/Maison Blanche, Baton Rouge, La. (7 stores)	207.6
Liberty House Hawaii, Honolulu, Hawaii (Amfac, Inc.) (50 stores)	207.5
Gimbels-Midwest, Milwaukee, Wis. (Batus Inc.) (9 stores)	200.0
G.Fox, Hartford, Conn. (May Department Stores) (8 stores)	193.0
Wieboldt Stores, Chicago, Ill. (Possible acquistion by WSI Acquisition Corp.) (13 stores)	191.2
Castner Knott Dry Goods Co., Nashville, Tenn. (Mercantile Stores) (11 stores)	190.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Younkers, Des Moines, Ia. (Equitable of Iowa) (29 stores)	$ 188.6
Joseph Horne, Pittsburgh, Pa. (Associated Dry Goods) (13 stores)	185.0
Howland-Steinbach, White Plains, N.Y. (Supermarkets General) (29 stores)	182.5
Sibley's, Rochester, N.Y. (Associated Dry Goods) (14 stores)	180.0
May-D & F, Denver, Colo. (May Department Stores) (12 stores)	177.6
The Jones Co., Kansas City, Mo. (Mercantile Stores) (7 stores)	170.0
McRae's, Jackson, Miss. (14 stores)	166.7
The M. O'Neil Co., Akron, Oh. (May Department Stores) (10 stores)	165.8
Broadway-Southwest Division, Mesa, Ariz. (Carter Hawley Hale) (10 stores)	165.0
Gimbels, Pittsburgh, Pa. (Batus Inc.) (7 stores)	165.0
Joslin's, Englewood, Co. (Mercantile Stores) (10 stores)	165.0
Goldsmith's, Memphis, Tenn (Federated) (6 stores)	164.0
Dillard's-Phoenix Div., Tempe, Ariz. (Dillard Dept. Stores) (12 stores)	160.0
ZCMI (Zion's Co-operative Mercantile Institution), Salt Lake City, Ut. (9 stores)	159.6
Dillard's-St. Louis Div., St. Louis, Mo. (Dillard Dept. Stores) (11 stores)	150.0
Boston Store, Milwaukee, Wis. (Acquired from Federated by P.A. Bergner) (8 stores)	148.9
Denver Dry Goods, Denver, Co. (Associated Dry Goods) (12 stores)	145.0
Gayfer's, Montgomery, Ala. (Mercantile Stores) (6 stores)	140.0
J. Bacon & Son Co., Louisville, Ky. (Mercantile Stores) (6 stores)	130.0
Hutzler's, Baltimore, Md. (11 dept. stores)	130.0
Miller & Rhoads, Richmond, Va. (Allied Stores) (22 stores)	130.0
Prange's, Green Bay, Wis. (H.C. Prange Co.) (20 department stores)	124.0
Ivey's-Carolinas, Charlotte, N.C. (Batus Inc.) (13 stores)	120.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Donaldson's, Minneapolis, Minn. (Allied Stores) (9 stores)	120.0
J.B. White, Augusta, Ga. (Mercantile Stores) (8 stores)	120.0
Hahne & Co., Newark, N.J. (Associated Dry Goods) (8 stores)	120.0
Buffum's, Long Beach, Ca. (14 jr. department stores, 4 spec. stores)	115.0
Goldwater's, Scottsdale, Ariz. (Associated Dry Goods) (9 stores)	112.0
Adam, Meldrum & Anderson, Buffalo, N.Y. (10 stores)	110.0
E. Gottschalk, Fresno, Ca. (9 stores)	106.0
Ivey's-Florida, Winter Park, Fla. (Batus Inc.) (12 stores)	105.0
Stone & Thomas, Wheeling, W.Va. (15 stores)	100.0+
The Lion Dry Goods Co., Toledo, Oh. (Mercantile Stores) (2 department stores and 2 specialty stores)	100.0
Pizitz, Birmingham, Ala. (12 stores)	100.0
Read's, Bridgeport, Conn. (Allied Stores) (6 stores)	100.0
Millers, Inc., Knoxville, Tenn. (Allied Stores) (13 stores)	100.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $50 MILLION TO $99 MILLION

	SALES VOLUME (Millions of $)
J. L. Brandeis & Sons, Omaha, Neb. (10 stores)	$ 95.0
Robinson's of Florida, St. Petersburg, Fla. (Associated Dry Goods) (7 stores)	94.0
Crowley, Milner and Company, Detroit, Mich. (Oakland Holding Co.) (9 stores)	92.9
Strouss, Youngstown, Oh. (May Department Stores) (9 stores)	92.6
William H. Block & Co., Indianapolis, Ind. (Allied Stores) (11 stores)	90.0
Mays (J.W. Mays, Inc.), Brooklyn, N.Y. (4 stores)	84.7
Pomeroy's, Inc., Levittown, Pa. (Allied Stores) (8 stores)	80.0
Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)	75.0
G.R. Herberger's, St. Cloud, Minn. (25 stores)	75.0
May-Cohens, Jacksonville, Fla. (May Department Stores) (6 stores)	69.4
Sage-Allen, Hartford, Conn. (12 stores)	66.0
Cain-Sloan, Nashville, Tenn. (Allied Stores) (4 stores)	60.0
Powers Dry Goods, Minneapolis, Minn. (Acquired by Allied Stores from Associated Dry Goods) (7 stores)	50.0

MAJOR NATIONAL/REGIONAL CHAINS

The following companies have major positions in general merchandise/apparel retailing--including the operation of traditional department stores, discount stores and off-price retail outlets, apparel specialty stores and catalog operations. Many of these chains are also engaged in nonrelated activities, including the operation of supermarkets or of specialized hard goods outlets, manufacturing, wholesaling or diverse activities such as the operation of auto repair shops, television stations, etc. The sales volumes reported are total net sales covering all operations unless otherwise noted, and are for the latest fiscal period or period reflecting 1984 volume.

Retail Chain	SALES (Millions of $)
Alexander's, Inc., New York, N.Y. (15 New York area stores)	$ 520.0
Allied Stores Corp., New York, N.Y. (Including specialty stores: Brooks Brothers volume estimated at $220 million; Ann Taylor with volume over $100 million)	3,970.5
Almy Stores, Inc., Boston, Mass. (Acquired by Stop & Shop in January 1985)	97.0
Amcena Corp., New York, N.Y. (a privately-owned company) (Owns Ohrbach's, N.Y., 12 stores with a volume of $200 million; Miller's Outpost; Kreega & Son; Maurice's; The Lodge at Harvard Square; and the Eastern Mountain Sports Chain) (Plans to purchase JByrons, Miami, from Jack Eckerd Corp.)	(total sales volume not available)
Ames Department Stores, Inc., Rocky Hill, Conn. (Acquired G.C. Murphy Co. in April 1985--1984 volume of $913.3 million)	822.0
Amfac, Inc., Honolulu, Hawaii (Retail Group sales: $272 million, including Liberty House of Hawaii, $207.5 million and VFO stores, $33 million)	2,392.4
C.R. Anthony & Co., Oklahoma City, Okla.	430.0
Associated Dry Goods Corp., New York, N.Y. (Includes 103 Caldor stores with a volume of $1.3 billion; 72 Loehmann's at $308 million; 236 department store units with a volume totaling $2.5 billion)	4,106.6
Batus Inc., Retail Divisions, New York, N.Y.	3,374.3
Beall-Ladymon, Shreveport, La.	85.0
L.L. Bean, Freeport, Me.	254.0
Belk Stores, Charlotte, N.C.	1,850.0
Bradlees, Braintree, Mass. (Division of The Stop & Shop Companies) (132 discount dept. stores)	1,404.6
Brown Group, Inc., St. Louis, Mo. Specialty Retailing:	308.7
Burlington Coat Factory, Burlington, N.J. (68 stores)	310.0
CWT Specialty Stores, Inc. (Cherry Webb and Touraine), South Attleboro, Mass. (50 stores in six New England states, more than half in Massachusetts)	80.5
Carson Pirie Scott & Co., Chicago, Ill. (Retail Group volume: $593.8 million; Department store volume: $369 million) (Acquired 19 Pants Corral stores from Giant Foods in June 1985--to be added to the 275 County Seat specialty stores acquired in May 1984 from Super Valu Stores)	1,177.2
Carter Hawley Hale Stores, Inc., Los Angeles, Ca. (Department store division sales: $2.7 billion; specialty store sales: $974.4 million, including Contempo Casuals with sales of $90 million)	3,724.3
Charming Shoppes, Inc., Bensalem, Pa.	297.3
Clothestime, Inc., Anaheim, Ca. (160 specialty stores in the western U.S.)	98.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
Danners, Inc. (Three-D), Indianapolis, Ind.	$ 189.0
Dayton Hudson Corp., Minneapolis, Minn. (Includes sales of Mervyn's, $2.1 billion; Target Stores, $3.5 billion; the department store division, $1.5 billion; specialty stores, $0.8 billion)	8,009.0
Dillard Department Stores, Inc., Little Rock, Ark. (93 stores) (Five semi-autonomous divisions: Little Rock, St. Louis, San Antonio, Fort Worth, Phoenix)	1,277.3
Dollar General Corp., Scottsville, Ky.	480.5
Dress Barn, Inc., Stamford, Conn. (156 stores) (acquired six former Pants Corral locations from Giant Foods in Washington, D.C. market; acquired eight Tagg Stores in 1984 from The Gap and 48 Off The Rack stores)	103.0
Duckwall-ALCO Stores, Inc., Abilene, Ks.	363.9
The Dunlap Co., Fort Worth, Tex. (Also operates Striplings & Co., Fort Worth; bought Sakowitz's Amarillo stores)	100.0
Edison Bros. Stores, Inc., St. Louis, Mo. (apparel specialty store division sales: $272.1 million)	1,054.7
Elder Beerman Stores Corp., Dayton, Oh. (Department store division: $238.0 million--total of 24 stores with the purchase of 4 Macy's stores in Ohio)	311.9
Evans, Inc., Chicago, Ill. (Fur specialty stores and leased departments)	145.7
Family Dollar Stores, Inc., Charlotte, N.C.	340.9
Fashion Bar, Aurora, Co. (22 Womens Fashion Bar, 17 Mens Fashion Bar, 19 States (Jr. Shops), 8 Young Set (girls), 6 F B Design Stores, 4 Hannah (Better) Shops)	125.0
Federated Department Stores, Inc., Cincinnati, Oh. (Department store division sales: $6.9 billion in 382 outlets) (Specialty store operations include The Children's Place, Pine Brook, N.J., 139 stores with a volume of $135.9 million, Gold Circle, Worthington, Oh., 50 stores with a volume of $627.9 million; Richway, Atlanta, 31 stores with a volume of $432 million) Excluding Supermarket Sales:	7,961.0
Fishers Big Wheel, Inc. New Castle, Pa. (73 stores)	160.0
Frederick's of Hollywood, Hollywood, Ca.	45.3
Gap Stores, Inc., San Bruno, Ca. (Including 21 Banana Republic stores with an estimated 1985 volume of $50 million and 29 Pottery Barn stores)	534.1
Gaylords National Corp., Secaucus, N.J.	145.7
General Mills, Inc., Minneapolis, Minn. (Including Eddie Bauer, 41 stores in the U.S. and Canada with sales of $150 million; The Talbots, 59 stores with sales of $144 million; We Are Sportswear, 22 stores with sales of $30 million, to be liquidated) Specialty Retailing Group sales:	437.6
Glosser Brothers, Inc., Johnstown, Pa. (Includes Gee Bee discount stores)	280.1
W.R. Grace & Co., New York, N.Y. (Includes Herman's World of Sporting Goods, 131 stores with sales of $368.4 million) Apparel Specialty Store sales:	610.0

(Plans to sell its retail group in 1986 as part of a restructuring program).

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
Hartmarx, Chicago, Ill. (Including 27 Wallachs stores with estimated volume of $40 million) Retail store sales:	612.0
Heck's, Inc., Nitro, W.Va. (Operates 125 discount department stores)	464.7
D.H. Holmes, New Orleans, La.	271.7
Howland-Steinbach, White Plains, N.Y. (Division of Supermarkets General Corp.) (29 stores)	182.5
Hutzler Bros. Co., Baltimore, Md. (Operates 11 department stores located in the Baltimore area and Maryland's Eastern Shore; purchased Sara Fredericks, a women's specialty chain, in October 1984) (Agreed to buy B. Altman & Co.'s retail operations in September 1985 from an investor group that is acquiring Altman's from the Altman Foundation).	130.0
Interco, Inc. St. Louis, Mo. (Including Idaho Dept. Stores--formerly P.N. Hirsch)	545.3
JByrons, Miami, Fla. (Division of Jack Eckerd Corp.) (Operates 57 junior department stores in Florida) (To be sold to Amcena Corp., New York City)	220.5
Jacobson Stores, Inc., Jackson, Mich.	240.7
Jamesway Corp., Secaucus, N.J.	475.4
Judy's, Van Nuys, Ca.	50.0
K mart Corp., Troy, Mich.	21,095.9
Kids "R" Us, Rochelle Park, N.J. (10 stores) (1985 plans call for the opening of 15 stores in N.Y., N.J., Pa. and Md.)	30.0
Kline Bros. Co., New York, N.Y.	80.0
Lamont's Apparel Stores, Seattle, Wash. (Division of Pay 'n Save Corp.)	136.0
The Limited Stores, Inc., Columbus, Oh. (Acquired Lerner Stores, with 1984 sales of $700 million, from Rapid-American in February 1985) (Acquired Henri Bendel, New York City, with 1984 sales of $26 million, in October 1985)	1,343.1
R.H. Macy & Co., Inc., New York, N.Y. (Proposed takeover by top management in October 1985)	4,065.1
Manhattan Industries, Inc., New York, N.Y. Specialty Store Retailing Sales:	151.2
May Department Stores, St. Louis, Mo. (Department store division sales: $3,235.7 million)	4,762.4
Melville Corp., Harrison, N.Y. (Including Marshall's, $1.2 billion in sales; Wilson's, $73.8 million; Chess King, $200.6 million; Foxmoor, $161.8 million; Linens 'n Things, $127.6 million) Apparel Specialty Store sales:	1,753.3
Mercantile Stores Co., Wilmington, Del. (78 stores)	1,706.9
Merry-Go-Round, Towson, Md.	158.1
Montgomery Ward, Chicago, Ill. (Mobil Corp.) (Sales of Jefferson Ward subsidiary: $570 million; 18 out of 44 Jefferson Ward stores sold to Bradlees, a division of Stop & Shop) (Montgomery Ward catalog operation discontinued in August 1985; its 1984 sales were $1.3 billion)	6,495.0
B.C. Moore & Sons, Wadesboro, N.C. (75 stores)	67.0
G.C. Murphy Co., McKeesport, Pa. (Acquired by Ames Department Stores, Rocky Hill, Conn., in April 1985)	913.3

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
National Shirt Shops, New York, N.Y.	$ 70.0
New Process Co., Warren, Pa.	299.1
S.E. Nichols, Inc., New York, N.Y.	294.1
Nordstrom, Inc., Seattle, Wash. (Operates 44 specialty stores) (Total of 5 California stores opened in 1985: estimated first year volumes for Corte Madera (Marin Country), Westside Pavilion (Los Angeles) and Galleria (Redondo Beach) stores estimated at $40 million +; Horton Plaza (San Diego store): $25-30 million; Oakridge Mall (San Jose) store opened late October 1985)	982.7
Oshman's Sporting Goods, Inc., Houston, Tex. (Including 19 Abercrombie & Fitch specialty stores with a volume of $35 million)	304.4
Paul Harris Stores, Inc., Indianapolis, Ind.	111.2
J.C. Penney Co., Inc., New York, N.Y.	13,451.0
Petrie Stores Corp., Secaucus, N.J. (Including Winkelman's with a volume of $88.9 million and Miller-Wohl with a volume of $180.8 million)	951.1
Phillips-Van Heusen Corp., New York, N.Y. Apparel Specialty Store sales:	133.5
H.C. Prange Co., Sheboygan, Wis. (Including Prangeway Discount Store sales)	247.0
Rapid-American Corp., New York, N.Y. (Including 800 Lerner Stores with sales of $700 million--sold to The Limited in February 1985; McCrory, 723 stores with sales of $900 million)	1,816.0
Rose's Stores, Inc., Henderson, N.C.	927.4
Ross Stores, Inc., Newark, Ca. (66 off-price chain stores)	210.5
SCOA Industries, Inc., Columbus, Oh. (Includes 123 Hills Department Stores and The Dry Goods Co., Aston, Pa., seven stores) General Merchandising Division Sales:	1,201.9
Salkin & Linoff, Inc., Minneapolis, Minn. (18 apparel specialty stores under various names in Minn.)	103.0
Schottenstein's Stores Corp., Columbus, Oh. (Including Wieboldt Stores with a volume of $191.2 million--attempted acquisition by WSI Acquisition Corp. in October 1985)	355.0
Schultz Bros., Lake Zurich,Ill. (74 general merchandise and variety stores)	60.0
Sears, Roebuck & Co., Inc. Chicago, Ill. U.S. Merchandising Operations:	21,671.0
Sprouse-Reitz Co., Inc., Portland, Ore.	182.7
Spurgeon Mercantile Corp., Chicago, Ill.	65.0
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of Clover Stores with sales of $250 million)	630.5
Super Valu Stores, Inc., Minneapolis, Minn. (Including 48 ShopKo stores) (County Seat sold to Carson Pirie Scott in mid-1984) Retail General Merchandising Operations:	609.6
Syms, New York, N.Y.	204.3

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
T.G.&Y. Stores, Oklahoma City, Okla. (500 family centers, 248 variety stores) (Household International, Prospect Heights, Ill., to sell its merchandising division--which includes T.G.& Y. Stores--to investment group in October 1985)	$ 2,205.4
Toys "R" Us, Rochelle Park, N.J. (35 new toy stores to open nationally in 1985)	1,701.7
TSS/Seedman's, Brooklyn, N.Y.	200.0
U.S. Shoe Corp., Cincinnati, Oh. Apparel Specialty Retailing Division:	905.9
The Vogue Shops, Jacksonville, Fla.	67.5
Wal-Mart Stores, Inc., Bentonville, Ark.	6,400.9
Weiner's, Houston, Tex.	250.0
Wickes Companies, Inc., San Diego, Ca. (Including 89 Howard's discount department stores) Apparel Specialty Store sales:	537.0
F.W. Woolworth Co., New York, N.Y. (U.S. Woolworth, $1,906 million; Richman Bros., $249 million; J. Brannam, $82 million; Holtzman's Little Folk Shops, $73 million) U.S. Operations:	3,468.0
Younkers, Des Moines, Iowa (Equitable of Iowa Companies)	188.6
Zayre Corp., Framingham, Mass. (Discount department stores: $2,195.7 million; Off-price division: T.J. Maxx, 156 units and Hit or Miss, 401 units, together had sales of $927.3 million)	3,123.0

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Allied Stores Corporation	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block & Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Brothers	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe	Memphis, Tenn.
Deys	Syracuse, N.Y.
Donaldson's	Minneapolis, Minn.
Garfinckel's	Washington, D.C.
Heer's	Springfield, Mo.
Herp's	Muskegon, Mich.
Jordan Marsh-Florida	Miami, Fla.
Jordan Marsh-New England	Boston, Mass.
Joske's	Dallas, (includes Houston & San Antonio divisions)
Levy's	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Miller's	Knoxville, Tenn.
Muller's	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's	Harrisburg & Levittown, Pa.
Powers Dry Goods Co. (acquired from Associated Dry Goods in June 1985; to be merged with Donaldson's)	Minneapolis, Minn.
Read's	Bridgeport, Conn.
Stern's/Gertz	Paramus, N.J.
Wren's (absorbed by Block's in 1984)	Springfield, Ohio
Amfac, Inc.	Honolulu, Hawaii
Liberty House of Hawaii	Honolulu, Hawaii
Village Fashion Outlets (VFO)	Philadelphia, Pa.
Associated Dry Goods	New York, N.Y.
L.S. Ayres & Co.	Indianpolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Co.
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co.	Pittsburgh, Pa.
Loehmann's	New York, N.Y.
Lord & Taylor	New York, N.Y.
Powers Dry Goods Co. (sold to Allied Stores in June 1985)	Minneapolis, Minn.
J.W. Robinson Co	Los Angeles, Ca.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co.	Rochester, N.Y.
The Stewart Dry Goods Co. (to be merged with L.S. Ayres in January 1986)	Louisville, Ky.
Sycamore Specialty Stores	Indianpolis, Ind.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Batus Inc. (Batus Retail Group)	New York, N.Y.
The Crescent	Spokane, Wash.
Frederick & Nelson	Seattle, Wash.
Gimbels-East	New York, N.Y.
Gimbels-Midwest	Milwaukee, Wis.
Gimbels-Pittsburgh	Pittsburgh, Pa.
Ivey's-Carolinas	Charlotte, N.C.
Ivey's-Florida	Orlando, Fla.
Kohl's Department Stores	Brookfield, Wis.
Marshall Field & Co.	Chicago, Ill.
Saks Fifth Avenue	New York, N.Y.
Thimbles	New York, N.Y.
Carson Pirie Scott & Company	Chicago, Ill.
Carson Pirie Scott Department Stores	Chicago, Ill.
County Seat	Chicago, Ill.
CPS Direct Marketing	Chicago, Ill.
Carter Hawley Hale Stores, Inc.	Los Angeles, Ca.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Ca.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Ca.
Emporium Capwell	San Francisco, Ca.
Neiman-Marcus	Dallas, Tex.
Thalhimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Ca.
Crown American	Johnstown, Pa.
Hess's Department Stores (acquired Rices Nachmans from Phillips-Van-Heusen Corp. in February 1985)	Allentown, Pa.
Dayton Hudson Corp.	Minneapolis, Minn.
Dayton Hudson Department Stores	Minneapolis, Minn.
Mervyn's	Hayward, Ca.
Target	Minneapolis, Minn.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	St. Louis, Mo.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
Elder Beerman Stores Corp.	Dayton, Oh.
Elder Beerman Department Stores	Dayton, Oh.
Margo's/Regan's	Dallas, Tex.
Spare Change	Dayton, Oh.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Federated Department Stores, Inc.	Cincinnati, Oh.
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store (sold to P.A. Bergner in January 1985)	Milwaukee, Wis.
Bullock's	Los Angeles, Ca.
Burdine's	Miami, Fla.
The Children's Place	Pine Brook, N.J.
Filene's	Boston, Mass.
Filene's Basement	Boston, Mass.
Foley's	Houston, Tex.
Goldsmith's	Memphis, Tenn.
Lazarus	Columbus, Oh.
I. Magnin	San Francisco, Ca.
MainStreet	Bannockburn, Ill.
Rich's	Atlanta, Ga.
Sanger-Haris (acquired John A. Brown stores from Dillard in May 1985)	Dallas, Tex.
Shillito Rikes	Cincinnati, Oh.
General Mills, Inc.	Minneapolis, Minn.
Eddie Bauer	Redmond, Wash.
The Talbots, Inc.	Hingham, Mass.
W.R. Grace	New York, N.Y.
Berman's	Brooklyn Park, Minn.
Herman's World of Sporting Goods	Cartaret, N.J.
Shepler's	Wichita, Ks.
Hartmarx (formerly Hart Schaffner & Marx)	Chicago, Ill.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Ks.
Blackburn's	Amarillo, Tex.
Capper & Capper, Inc.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansville, Ind.
Field Brothers	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Brothers	San Antonio, Tex.
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Ca.
Jack Henry	Kansas City, Mo.
Heyward mahon	Greenville, S.C.
J.O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer's	Atlanta, Ga.
Leopold Price & Rolle	Houston, Tex.
Levy-Wolf	Jacksonville, Fla.
Liemandt	Minneapolis, Minn.

(Hartmarx continued on next page)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Hartmarx (continued)	
Littler's	Seattle, Wash.
Merritt Schaefer & Brown	Austin, Tex.
National Clothing	St. Louis, Mo.
Polo Shop	Seattle, Wash.
Porter-Stevens	New Orleans, La.
Root's	Red Bank, N.J.
Shulman's	Hampton, Va.
Silverwoods	Los Angeles, Ca. and Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F.R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Oh.
Wallachs	New York, N.Y.
Wallachs of Florida	Miami, Fla.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Zachry	Atlanta, Ga.
Interco, Inc.	St. Louis, Mo.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
Idaho Department Stores Co.	Caldwell, Id.
United Shirt Distributors, Inc.	Detroit, Mich.
Jack Eckerd Corp.	Clearwater, Fla.
JByrons Department Stores (To be sold to Amcena Corp.)	Miami, Fla.
Eckerd's Apparel, Inc.	Charolotte, N.C.
The Limited, Inc.	Columbus, Oh.
Henri Bendel (acquired in October 1985)	New York, N.Y.
Lane Bryant	New York, N.Y.
Lerner Stores Corp. (acquired from Rapid-American)	New York, N.Y.
The Limited	Columbus, Oh.
The Limited Express	Columbus, Oh.
Sizes Unlimited/Smart Size	New York, N.Y.
Victoria's Secret	Columbus, Oh.
R.H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Macy's Atlanta (consolidation of Davison's & Macy's Midwest)	Atlanta, Ga.
Macy's California	San Francisco, Ca.
Macy's New York	New York, N.Y.
Manhattan Industries	New York, N.Y.
Frost Brothers	San Antonio, Tex.
Manhattan Factory Outlet	Fairlawn, N.J.
Manhattan Ward, Inc.	Conshohocken, Pa.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
The May Department Stores Co.	St. Louis, Mo.
Famous-Barr Co.	St. Louis, Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington, D.C. and Baltimore, Md.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Oh.
May Co., California	Los Angeles and San Diego, Ca.
May-D & F	Denver, Co.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Oh.
Stouss	Youngstown, Oh.
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Linens 'n Things	Roseland, N.J.
Marshall, Inc.	Woburn, Mass.
Wilson's	Los Angeles, Ca.
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner Knott Co.	Nashville, Tenn.
de Landrecies	Fargo, N.D.
Gayfer's/Montgomery Fair	Montgomery, Ala.
C.J. Gayfer & Co.	Mobile, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.
Joslin's	Denver, Co.
Lion	Toledo, Oh.
McAlpin's	Cincinnati, Oh. & Lexington, Ky.
Root's	Terre Haute, Ind.
J.B. White	Augusta, Ga. & Columbia, S.C.
Petrie Stores Corp.	Secaucus, N.J.
David's	Secaucus, N.J.
Franklin's	Secaucus, N.J.
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Marianne	Secaucus, N.J.
Miller-Wohl	Secaucus, N.J.
Petrie's	Secaucus, N.J.
Stuart's	Secaucus, N.J.
Whitney	Secaucus, N.J.
Winkelman's	Detroit, Mich.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Ca.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Ma.
Rices Nachmans (sold to Hess's Dept. Stores in February 1985)	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Lerner Stores Corp. (sold to The Limited in February 1985)	New York, N.Y.
McCrory Stores Corp.	New York, N.Y.
U.S. Shoe Corp.	Cincinnati, Oh.
Ups 'n Downs	Enfield, Conn.
August Max	New York, N.Y.
Career Images	Enfield, Conn.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T.H. Mandy	Merrfield, Va.
The Proving Ground	Enfield, Conn.
J. Riggings	Atlanta, Ga.
Petite Sophisticate	Enfield, Conn.
F.W. Woolworth Co.	New York, N.Y.
Anderson-Little	Fall River, Mass.
J. Brannam	New York, N.Y.
Holtzman's Little Folks Shops	City of Industry, Ca.
Richman Brothers	Cleveland, Oh.
Susie's Casuals	New York, N.Y.
Woolworth's	New York, N.Y.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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